

Breaking New Ground:
Pastoral Leadership in the Roman Catholic Church
Through the Lens of Bowen Systems Theory

by

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Divinity School of Duke University

Date: April 20, 2014

Approved:

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Thesis submitted in partial fulfillment of
the requirements for the degree of Doctor of Ministry
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ABSTRACT

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Abstract

This thesis studies Bowen Systems Theory from the perspective of leadership in light of the Second Vatican Council of the Roman Catholic Church because I believe that this theory/systemic understanding of leadership has much to offer to pastoral ministry today and to the theology of the ministerial priesthood within the Roman Catholic Church.

The Second Vatican Council brought forth a renewed ecclesial understanding of the Church and of the ministry of pastoral leadership on the part of the ordained – one that focuses on the people of God as the foundational reality of the Church, and one that emphasizes the sharing of the gifts of all the baptized as the key to a vast project of ecclesial renewal. In this thesis I look at Bowen Systems Theory through the lens of the ministerial priesthood’s pastoral leadership in the Catholic Church as articulated by the Council and a series of subsequent official documents that spelled out the implications of the “genius” of the Council. This new understanding of ordained ministry makes the local Roman Catholic parish an ideal place to implement the insights of Bowen Systems Theory as a way to provide a more effective style of pastoral leadership aimed at creating a vibrant, dynamic faith-filled community focused upon the Church’s mission of evangelization.

In the half-century since the time of the Second Vatican Council, new insights have matured among researchers studying how families and organizations function,

particularly around the role that self-differentiated leadership plays in promoting healthy functioning on the part of organizational leaders. The cohesiveness and intensity of emotional bonds that characterize church systems makes the application of Bowen Systems Theory particularly apt in the study of ecclesial communities. Much has been written about Bowen Systems Theory and its application to church/synagogue leadership in other ecclesial communities, and yet little has been written from a Roman Catholic perspective. By looking at the Catholic Church's theology of ordained ministry in light of Bowen Systems Theory, I draw parallels that ground a robust pastoral theology of leadership within the Roman Catholic tradition.

In a remarkable passage that foreshadowed the challenges to today's pastoral leader, the Council insisted that in order to minister effectively, pastors must be prepared to "break new ground in pastoral methods"¹. To minister effectively today, a pastoral leader needs to master ministerial approaches that simply were not required by previous generations of pastors. Bowen Systems Theory is one innovative and contemporary understanding of leadership from a systems perspective that is a particularly meaningful and fruitful way to understand the need for a leader to be "self-differentiated" so as to lead more effectively.

¹ The Holy See. *Directory on the Ministry and Life of Priests* (Vatican City: Libreria Editrice Vaticana, 1994), 13.

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Dedication

This thesis is dedicated to my families: My Reamer (Geoghan and Stuehler) family of origin, especially my parents Raymond and Frances; my Franciscan family of Holy Name Province, especially David McBriar and Bill McConville; and my Parish family of the Catholic Community of St. Francis of Assisi, Raleigh NC, especially the pastoral staff and leadership councils.

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I owe a tremendous debt of gratitude to Bob Duggan who first introduced me to Bowen Systems Theory and the writings of Rabbi Edwin Friedman. Bob has served as mentor, leadership coach and friend whose encouragement and guidance is a highly treasured gift.

To the faculty of Duke Divinity School, especially Will Willimon and Sam Miglarese along with Judith Heyhoe of the writing lab and Lisa Kowite for sharing her detailed editing skills, I am most thankful.

1. Vatican II

1.1 Overview of Vatican II and Its Purpose¹

When Angelo Roncali was elected the 261st Pope in late October 1958, no one would have anticipated the changes that he would bring about within the Roman Catholic Church. Three months later on January 25, 1959, he quietly announced his intention of calling an ecumenical Council to consider measures for renewal of the Church in the modern world, promotion of diversity within the encasing unity of the Church, and the reforms that had been earnestly promoted by the ecumenical and liturgical movements. He was expected to be a caretaker Pope after the long reign of Pope Pius XII, but it soon became clear that he was about the business of reform and renewal. Pope John XXIII's vision was that the Church needed to change from within. For the most part, previous ecumenical councils were reactive. Pope John's council was to be different – proactive rather than reactive. This council was not called to confront a serious attack upon the doctrinal or organizational integrity of the Church or simply to repeat ancient formulas or to condemn dissidents and heretics. On the contrary, Pope John, in his opening address of October 11, 1962, saw the need to study and expound doctrine “through the methods of research and through the literary forms of modern

¹ For a more detailed and scholarly understanding of Vatican II please refer to Giuseppe Alberigo *History of Vatican II*, 5 vols. (Maryknoll, NY: Orbis Books, 1995-2006).

thought,”² and to do so in a way that is “measured in the forms and proportions of a magisterium which is predominantly pastoral.”³

Pope John’s purpose in calling the Council was to eradicate the seeds of discord and promote peace and the unity of all human kind. He chose as a guiding metaphor of what he wanted the Council to accomplish the image of opening the windows of the Church to allow the Holy Spirit to rush in like a breath of fresh air. If one word could describe what the Council was about, it was the word *aggiornamento*, frequently used by Pope John to describe what he had in mind as the Council’s task. *Aggiornamento* is an Italian word meaning “bringing up to date,” and by its very nature means that there would be changes to come as a result of the Council. Later in this paper I will describe how the changes that resulted from the Council can be looked at through the lens of Bowen Systems Theory and their implications for the understanding and exercise of priestly ministry.

Before the Council, it would have been difficult to imagine that any major changes would result from a gathering of the world’s bishops. The bishops who would participate had an average age of sixty, were temperamentally conservative and culturally detached. And yet several factors came into play that transformed those bishops into an instrument of far-reaching changes within the Catholic Church.

²Second Vatican Council, *Pope John’s Opening Speech to the Council*, in *The Documents of Vatican II*, ed. Walter M. Abbott, S.J., (New York: American Press, 1966), 714-715.

³ Ibid.

Whereas the largest number of bishops to attend any previous ecumenical Council had been Vatican Council I with 737 present, Vatican II had more than 2,600 bishops present from literally all over the world. This made Vatican II the most representative ecumenical council ever in terms of diverse nations and cultures. This Council also included non-Catholics as observers, and they were invited to offer insights to the proceedings as they took place. With the modern conveniences of electric lights, telephones, typewriters and other means of communication and transportation, this was also the first Council to be covered “live” by newspapers and media throughout the world. With these modern means of communication, it proved impossible for the Church to “control” the message of the Council’s work, as it was covered as much as a journalistic event as it was a sacred gathering of inspired leaders.

In the first document that came out of the four-year Council – *The Constitution on the Sacred Liturgy* – it is easy to get a sense of the changes that the Council would begin to bring about. In its opening paragraph, the *Constitution* explained the purpose of the Council:

It is the goal of this most sacred Council to intensify the daily growth of Catholics in Christian living; to make more responsive to the requirements of our times those Church observances which are open to adaption; to nurture whatever can contribute to the unity of all who believe in Christ; and to strengthen those aspects of the Church which can help summon all of mankind into her embrace.⁴

⁴Second Vatican Council, *Sacrosanctum Concilium*, no. 1, in *Vatican Council II, Volume 1: The Conciliar and Postconciliar Documents*, ed. Austin Flannery, O.P., (Northport, New York: Costello Publishing Co., 1975).

And indeed with the purpose of the Council clearly articulated, the breath of the spirit that entered upon John XXIII's opening of the windows set in motion a process that would change the balance of life within the Church forever. It became increasingly clear that the only aspect of the Church's life that was certain was that there would be far-reaching changes in the Church's future.

There are many observances of the Church that are open to adaption depending upon one's starting point. The current Pope, Francis, exemplified this on his first Holy Thursday as Supreme Pontiff by washing the feet of non-Christian women! The fact that he washed women's feet was already a significant departure from tradition; that they were Muslim was surely never dreamed of at the Council; and that they were incarcerated at the time demonstrates the extent to which the teachings of the Council have had implications well beyond the capacity of any of its participants to imagine. Francis' pastoral care that day was deeply rooted in the teaching of the Council, and by his actions he was setting an example for the entire Church of how "the joy and hope, the grief and anguish of the men of our time, especially of those who are poor or afflicted in any way, are the joy and hope, the grief and anguish of the followers of Christ as well."⁵

⁵ Second Vatican Council, *Gaudium et Spes*, no. 1, in *Vatican Council II, Volume 1: The Conciliar and Postconciliar Documents*, ed. Austin Flannery, O.P., (Northport, New York: Costello Publishing Co., 1975).

The changes that the Council brought about can be seen in numerous ways. This paper will focus primarily on the impact of the Council on the pastoral leadership of the priest – its understanding and its post-conciliar exercise. This paper will also show how looking at this change through the lens of Bowen Systems Theory can be a helpful way to understand and implement the Church's ongoing understanding of itself.

1.2 Theological Understanding and Role of the Priest Before Vatican II

Prior to the Council, from the perspective of ministerial leadership the image and understanding of Church communicated by the hierarchy was of an institution of certainties and security in a world of rapid change, political instability and uncertainties. Institutionally the Church claimed a sure identity and a theological confirmation of its future survival. Its belief system and values were clearly defined and those who belonged to the Church had a clear Catholic identity and communal belonging.

In the time before Vatican II it was popularly understood that there was “no salvation outside the Catholic Church.” This played itself out in terms of the Catholic “ghetto” mentality in which many Catholics lived within Catholic institutions including schools, sports leagues, and even hospitals, providing an acceptance that was not always found in the rest of society while at the same time encouraging a separation. This emphasis on the Church as the sole means to eternal salvation was reinforced by the priest's role being seen largely as providing sacramental services to his parishioners, and

the parishioner's role was to receive the sacraments, so that they could obtain salvation and go to heaven. As Thomas O'Meara describes, "before Vatican II, the 'position' of the laity in the church was to sit at the sermon, kneel for communion, and reach into [the laity's] pockets for the collection: in short, 'to pray, pay and obey'." ⁶ It was commonly understood that "Father" knows best, and the people for the most part were happy to oblige. The organic Body of Christ was commonly understood as a pyramid with the Pope at the apex and the laity creating the foundation at the bottom. There was a priestly caste system, an ingrown professional group that strived for holiness and because of the sacramental grace they received, the priests shared this with the laity. In short the laity were dependent upon the priest, much as children might be upon their parents.

Prior to the second Vatican Council, the role of the priest was to care for the souls of those entrusted to his care. The emphasis of understanding was that the priest was an "alter christus," another Christ. He was one "set apart" from the people in a way that was emphasized by the altar rail that separated the priest from the people. Priests were invested with "cultic" meaning by virtue of the fact that only they were able to provide the sacraments that the laity depended upon for their salvation. Though I grew up in a "post-Vatican II" parish, I can remember as an altar boy (at the time girls were not

⁶ Thomas F. O'Meara, *Theology of Ministry: Completely Revised Edition* (Mahwah, NJ: Paulist Press, 1999), 8.

allowed) feeling it was a privilege to be able to enter into the sanctuary of the church – a “sacred space” set apart from where the people were behind the altar rail. After getting vested in cassock and surplice we would process from the sacristy (which was next to the sanctuary) directly to the altar, not entering into the body of the Church – another example of the separation from the people. When it came time for Communion, there were long lines waiting to kneel at the altar rail because only the priests could distribute Communion. The priests would mysteriously and angelically appear at the appropriate time to help distribute Communion. I knew, however, that they were in the priests’ “lounge” on the other side of the sacristy reading the paper and drinking coffee (when they weren’t counting the collection).

This cultic/sacred “iconic” understanding of priesthood had its roots in the seventeenth century French school of spirituality, which viewed the priest as representing Christ, both through the priest’s interior holiness and the offering of the “Holy Sacrifice of the Mass.” In this line of thought Richard Gaillardetz points out that the entire theology of the priesthood was reduced to one essential moment: when the priest pronounces the words of institution in the Eucharist, thereby transforming the bread and wine into the Body and Blood of Christ.⁷ The priest alone represented Christ – not just in his action or service on behalf of the kingdom, but in his very being.

⁷ Richard Gaillardetz, *The Church in the Making* (Mahwah, NJ: Paulist Press, 2006), 84.

1.3 From “Cultic” to “Ministerial” Leadership

The Christological view of the ministerial priesthood presented in Council documents is broader and richer and refers to his “entire pastoral ministry as a proclaimer of the gospel and a shepherd of the people of God (in collaboration with his bishop).⁸ The Council’s document that deals most directly with the priest is the *Decree on the Ministry and Life of Priests*. This document was built upon the foundation of *Lumen Gentium* and brought about great change in the understanding and identity of the person of the priest. Prior to Vatican II, the cultic model of priesthood had dominated Catholic thought for centuries with an understanding rooted in the identity of the priest as “set apart” from the people. The primary role of the priest was to offer the sacrifice of the Mass on behalf of the people. With Vatican II, the Council moved away from this focus on the priest and his individual focus on his holiness to encourage the entire people of God to grow together in holiness.

This broadening of the role of the priest can be seen in the titles of the document as it went through several stages of editing and deliberation:

| | |
|---|--|
| <i>On Clerics</i> | <i>(De Clericis)</i> |
| <i>On Priests</i> | <i>(De Sacerdotibus)</i> |
| <i>On the Life and Ministry of Priests</i> | <i>(De Vita et Ministerio Sacerdotali)</i> |
| <i>On the Ministry and Life of Presbyters</i> | <i>(De Presbyterorum Ministerio et Vita)⁹</i> |

⁸ Ibid.

⁹ Maryanne Confoy, *Rediscovering Vatican II: Religious Life and Priesthood* (Mahwah, NJ: Paulist Press, 2008), 27.

Looking at the evolution of this document provides insight into how the Council fathers progressed in their thinking. “The progressive, and in the end decisive, change of titles for the document on the Catholic priesthood signals a radical change in theological reality, from a cult-based priesthood mediating the holy to a communion-based presbyterate ministering to needs.”¹⁰

The third and fourth changes are particularly telling. In English, we translate the words *sacerdotali* and *presbyterorum* as priest, but the Latin *sacerdos* refers to a “cultic priest”, someone who offers a sacrifice. The word *presbyteros* refers to an elder, a leader in the community.¹¹ This is not just semantics. This decree shifts the focus from an understanding of the priest as the leader of a ritual to one who is a leader of a wide array of ministerial activities. This will have tremendous implications on how a priest is formed and prepared for leadership. It also has a great impact upon the self-understanding of the priest.

The Council makes a rather dramatic change in no longer seeing the priest as the cultic man, set apart from the people. The Council looks at the priest (presbyter) as no longer segregated from or set over people. He is called to minister to people, be a builder of the community, and bring forth the gifts of all the baptized and animate them

¹⁰ Michael G. Lawler and Thomas J. Shanahan, *Church: A Spirited Communion* (Collegeville: The Liturgical Press, 1995), 90.

¹¹ Edward P. Hahnenberg, *A Concise Guide to the Documents of Vatican II* (Cincinnati: Franciscan Media 2007), 90.

leading the assembly through worship to “that full, conscious, and active participation in liturgical celebrations which is demanded by the very nature of the liturgy, and to which the Christian people . . . have a right and obligation by reason of their baptism.”¹². The Council’s teaching makes the presbyter specifically responsible for the building up of the body. It makes him responsible also to build a communion that looks, not only inward to itself, but also outward to the larger world. The decree speaks powerfully on the priest as “minister of God’s word.” “It is the first task of priests as co-workers of the bishops to preach the Gospel of God to all.”¹³ To preach effectively, the priest must know those among whom he is serving. In the first months of his pontificate Pope Francis often said that the shepherd must have the smell of his sheep. If presbyters are to proclaim God’s word, not just in some abstract fashion but in concrete circumstances, then they need to be as conversant as they can with the people of God and the circumstances of their lives. Since they must preach the gospel to people of varying levels of education and development and condition, they must cultivate the art of relating to all.

¹² Second Vatican Council, *Sacrosanctum Concilium*, no. 14, in *Vatican Council II, Volume 1: The Conciliar and Postconciliar Documents*, ed. Austin Flannery, O.P.

¹³ Second Vatican Council, *Presbyterorum Ordinis*, no. 4, in *Vatican Council II, Volume 1: The Conciliar and Postconciliar Documents*, ed. Austin Flannery, O.P., (Northport, New York: Costello Publishing Co., 1975).

Lawler and Shanahan state, “Catholic presbyters have not ceased to be persons of the cult, they have ceased only to be exclusively persons of the cult.”¹⁴ So there is a tension that must be held in balance: the priest is being called to be both a person that is set apart, and to be one with the faithful in the common priesthood he shares with the entire people of God. I experienced this serving as a priest chaplain in the Navy during the Iraq War in 2003. My presence was appreciated in the combat zone where we served, not because of my personhood, but as a “man of the cloth.” It was the most poignant time in my priesthood. I felt and understood what the fact of my presence as cultic was all about, while at the same time living among the troops and ministering to their needs pastorally. To paraphrase Augustine, it was a matter of being with and being there for. Though there may be a healthy tension, it is clear that the Council has brought about a significant shift in understanding the role and identity of the priest. The priest by his vocation must be:

set apart in some way in the midst of the people of God, but this is not in order that they should be separated from their people or from any man, but that they should be completely consecrated to the task for which God chooses them. They could not be the servants of Christ unless they were witnesses and dispensers of a life other than that of this earth. On the other hand they would be powerless to serve men if they remained aloof from their life and circumstances.¹⁵

¹⁴ Lawler and Shanahan, *Church: A Spirited Communion*, 93.

¹⁵ Second Vatican Council, *Presbyterorum Ordinis*, no. 3.

It was not just my cultic presence among the sailors and marines, it was also my ability to preach as a man among them in a way that connected the gospel to the difficult situation we faced of war in the desert.

1.4 The Council's Universal Call to Holiness

“All in the Church, whether they belong to the hierarchy or are cared for by it, are called to holiness . . . it is expressed in many ways by the individuals who, each in his own state of life, tend to the perfection of love, thus sanctifying others . . .”¹⁶ This quotation that describes the universal call to holiness was a hallmark of the Council that had extraordinary and unexpected consequences for all Catholics, whatever their calling or commitment. It had dramatic ramifications for the subsequent shape and understanding of ministry for ordained priests and the priesthood of all the baptized.

If the understanding of the priest prior to Vatican II highlighted a man set apart by ordination from the people he is called to serve, the understanding of the priest after Vatican II is as one *with* and *for* the people he is called to serve. It is a notion that goes back to the time of Augustine: “When I am frightened by what I am to you, then I am consoled by what I am with you. To you I am the bishop, with you I am a Christian. The first is an office, the second a grace; the first a danger, the second salvation.”¹⁷ The

¹⁶ Second Vatican Council, *Lumen Gentium*, no. 39, in *Vatican Council II, Volume 1: The Conciliar and Postconciliar Documents*, ed. Austin Flannery, O.P., (Northport, New York: Costello Publishing Co., 1975).

¹⁷ St. Augustine *Sermon* 340, 1 as quoted in Second Vatican Council, *Lumen Gentium*, no. 32.

emphasis is not on ordination but rather on the one common baptism of the believers.

The Council recognized that the priest is the one who is in the trenches and who perhaps more than anyone else would be responsible for the implementation of the teachings of the Council. Therefore the Council “thought that it would be extremely useful to treat the priesthood at greater length and depth.”¹⁸

This mindset is clear in the document *Presbyterorum Ordinis* (*On the Ministry and Life of Priests*), in which the Council Fathers “thought that it would be extremely useful to treat the priesthood at greater length and depth.”¹⁹ However probably the greatest impact on the lives of priests came not from this document but rather from the two major documents on the Church, *Lumen Gentium* (*Light of the Nations, The Dogmatic Constitution on the Church*) and *Gaudium et Spes* (*Joy and Hope, The Pastoral Constitution on the Church in the Modern World*), as well as that on liturgy, *Sacrosanctum Concilium* (*Constitution on the Sacred Liturgy*).

1.5 The Priesthood of All Believers

Lumen Gentium makes a significant theological statement when it speaks first of the priesthood of all believers and then of the ministerial priesthood:

Though they differ essentially and not only in degree, the common priesthood of the faithful and the ministerial or hierarchical priesthood are nonetheless ordered one to another; each in its own proper way

¹⁸ Second Vatican Council, *Presbyterorum Ordinis*, no. 1.

¹⁹ Ibid.

shares in the one priesthood of Christ. The ministerial priest, by the sacred power that he has, forms and rules the priestly people; in the person of Christ he effects the Eucharistic sacrifice and offers it to God in the name of all the people. The faithful indeed, by virtue of their royal priesthood, participate in the offering of the Eucharist. They exercise that priesthood, too, by the reception of the sacraments, prayer and thanksgiving, the witness of a holy life, abnegation and active charity.²⁰

Lumen Gentium sets forth an important understanding of the connection between the priest and the laity. While acknowledging the differences in role, it emphasizes the interconnectedness and need that the priest and faithful have for one another. The priest continues to exercise a leadership role, but the way of leading and understanding his leadership is changing with the appreciation of reciprocal roles in which each has a significant role to play in growing in holiness. The faithful also share in the responsibility and, as noted earlier in *Sacrosanctum Concilium*, have a right and obligation to participate.

1.6 Council's Understanding of Ministerial Priesthood

Lumen Gentium locates the understanding of priest in the threefold office of Christ: Priest, Prophet and King. Those who have authority in the Church must carry on Christ's work by the three functions of teaching, sanctifying, and governing the people of God. Specifically the role of the priest has three functions: "preach the Gospel,

²⁰ Second Vatican Council, *Lumen Gentium*, no. 10.

shepherd the faithful, and celebrate divine worship.”²¹ The Council gives renewed priority to the ministry of the Word, which makes for a Gospel-based priesthood, and to the pastoral care of the faithful, which makes for a service-based ministry. These three roles of priest as preacher of the Word, shepherd of souls and celebrator of divine worship are intimately connected with a focus upon service. The priest is set apart from the people only in the sense that he is called to minister to them, to shepherd them into communion with one another and with Christ. Priests, in common with all who have been reborn in the font of baptism, are brothers among brothers as members of the same Body of Christ, which all – not just the priest – are commanded to build up.²²

In the conciliar documents there is a greater expectation and understanding that the priest is to be a gatherer of people and builder of community, one who is to “gather the family of God as a brotherhood endowed with the spirit of unity and lead it in Christ through the Spirit to God, the Father.”²³ Growing up in my parish I recall a great emphasis by the priests, in particular Fr. Tom Kleisser, who made it a point to visit every family and to invite them to become involved in a small group to study the scriptures and share their faith. He was following the direction of the Council, bringing people, especially families, together as a community to build up the body of Christ. He was

²¹ Ibid., no. 28.

²² Second Vatican Council, *Presbyterorum Ordinis*, no. 9.

²³ Ibid., no. 6.

providing the leadership the Council called for through *Lumen Gentium* to encourage the faithful to exercise their “royal priesthood”.

Our parish’s new church was dedicated in 1962 just as the Council was getting started. The old church was turned into a hall. With the promulgation of the Council’s document on the liturgy a few years later, it became the place for the “experimental” Mass in which the priests would focus their homilies on the families who would gather for a less formal liturgy. The altar was in the middle of the room, and the priests would talk *with* us, not *at* us from the raised pulpit that the new church contained. There was a feel and a mood that we were in this together – priest and people side by side. And of course most memorable was the donuts served afterwards to help form community. This experience of Mass was not something an overly creative or “rogue” priest dreamed up and introduced on his own but rather was an example of the experimentation called for as changes were being brought about as the Council was being implemented and explored. Not only was the Mass changing, also the role of the priest as leader of the community was changing.

1.6.1 Implications of Vatican II’s Understanding of Ministerial Priesthood

The key contribution of Vatican II to a contemporary understanding of ministerial priesthood is in its movement away from an understanding of priesthood that was confined to the sacerdotal ministry in the celebration of the sacraments.

Presbyterorum Ordinis expands the Council of Trent's (1545-1563) understanding of the priest through an emphasis on the threefold office of Christ as teaching, sanctifying, and shepherding, linked to the threefold mission of the Church. By situating the role of the priest within the common priesthood, Vatican II contextualizes his unique identity thereby signaling a shift in which to bring about the reign of God, which means that the role of the priest is to cooperate and collaborate with the people of God in the mission of the church.

The Council's teaching makes the presbyter specifically responsible for the building up of the body, but the Council also insists that those ordained to pastoral leadership were not to absorb into their own ministry the entire task of building up the church on their own. The Council makes him responsible also to build a communion that looks, not only inward to itself, but also outward to the larger world, including the various charisms of the laity, uniting "their efforts with those of the laity."²⁴

The decree speaks powerfully on the priest as minister of God's word as "the first task of priests as co-workers of the bishops to preach the Gospel of God to all."²⁵ To preach effectively, the priest must know those whom he is serving. In other words, as Pope Francis said in his first Holy Thursday Chrism Mass Homily as Bishop of Rome, "the shepherd must have the smell of his sheep." If presbyters are to proclaim God's

²⁴ Ibid., no. 9.

²⁵ Ibid., no. 4.

word, not just in some abstract fashion but in concrete circumstances, they need to be as conversant as they can with the people of God and the circumstances of their lives. Since they must preach the gospel to people of varying levels of education and development and condition, they must cultivate the art of relating to all.

1.6.2 A New Kind of Seminary Formation

Cardinal Suenens, a leading voice at the Council, was reported as saying, “Now the moment has arrived for a searching examination. Vatican Council II must create a new kind of seminary in line with the needs of today. If there is one place where Pope John’s *aggiornamento* is needed, it is here.”²⁶ This moment referred to by Cardinal Suenens was achieved by the Council’s *Decree on Priestly Training (Optatam Totius)*, encouraging local episcopal conferences to develop their own programs of priestly formation attentive to the needs of their own local churches.

The Council documents stand in relationship to the other documents in that they overlap and dovetail with one another – a comprehensive balanced system of relationships. An example of this is *Optatam Totius*, the *Decree on Priestly Training* issued on October 28, 1965, and *Presbyterorum Ordinis*, the *Decree on the Ministry and Life of Priests* issued six weeks later. These two documents are both grounded in *Lumen Gentium*’s understanding of Church and the people of God. The first sentence of

²⁶ Confoy, *Rediscovering Vatican II*, 77.

Optatam Totius reflects this collaboration: “The Council is fully aware that the desired renewal of the whole Church depends in great part upon the priestly ministry animated by the spirit of Christ and it solemnly affirms the critical importance of priestly training.”²⁷ Affirming the importance of training, this decree also places the context of training not so much in the universality of the priesthood, but rather in training the seminarian for priestly ministry in his own culture. As a result of this document, training must become an integrated training of the whole human being. This decree affirms the humanity of the priest and stresses the relational context of seminary training and the responsibility of the bishop to adapt the program of studies to the particular local needs. “The decree is responsible to the concerns of the Council members for a formation that is in continuity with the past, adaptable in the present context, and responsible for the future. It has to be understood in the context of the prevailing ecclesiology and worldview that permeated the Council in its deliberative processes.”²⁸

Though it would be almost two decades later that I would begin theological training for ministerial priesthood, the impact upon my training and development began to take shape as a result of the Council. My education was at a theological union that came about as a result of the Council, which also prepared lay men and women for

²⁷ Second Vatican Council, *Optatam Totius*, no. 1, in *Vatican Council II, Volume 1: The Conciliar and Postconciliar Documents*, ed. Austin Flannery, O.P., (Northport, New York: Costello Publishing Co., 1975).

²⁸ Confoy, *Rediscovering Vatican II*, 105.

pastoral ministry and would require classes in other religious traditions (for the degree, not for ordination). In the forthcoming documents following the Council this changing role of the priest from *sacerdos* to the ministerial priesthood *presbyter* is reflected and seen in subtle and not so subtle ways that called for a different way of training men for ministry.

Shortly after the Council closed, the Sacred Congregation for Catholic Education published “Basic Norms for Priestly Formation”. It was written with the cooperation of the Bishops’ conferences to give guidance on the local (national) level “in order to stimulate fittingly the work of conciliar renewal.”²⁹ Within the United States several documents to guide the initial and ongoing formation of priests were generated. The U.S. Bishops developed a “Program of Priestly Formation,” publishing the fifth edition in 2006, which builds upon the foundation of previous versions. Bishop Thomas Olmsted notes in his foreword this most recent edition was greatly influenced by John Paul II’s apostolic exhortation: *Pastores Dabo Vobis (I Will Give You Shepherds)*. As such, it represents a mature evolution of Catholic thought about priestly ministry, building on the vision of the Council and nearly a half century of subsequent theological and pastoral reflection.

²⁹ Sacred Congregation for Catholic Education *Ratio Fundamentalis Institutionis Sacerdotalis Preface in Norms for Priest for Priestly Formation Volume I November 1993* (Washington, D.C., United States Catholic Conference, 1994).

The U.S. Bishops recognized that ongoing formation is a vital and necessary aspect of the life of a priest. They also set forth guidelines for ongoing formation, publishing “The Basic Plan for the Ongoing Formation of Priests” in 2000, because “ongoing formation is the continuing integration of priests’ identity and ministry for the sake of mission.”³⁰ This plan uses the four categories of priestly formation set for in *Pastores Dabo Vobis*: human, spiritual, intellectual and pastoral.

Bowen Systems Theory emphasizes the importance of an individual being willing to be self reflective to gain insights into his or her way of understanding, his or her way of functioning, and how it is rooted in his or her family of origin. The U.S. Bishops in their Program of Priestly Formation build upon this same foundation of family, noting that “the candidates’ human formation in the seminary is very much affected by the character formation he has received in his family, cultural background, and society.”³¹ Understanding how a person’s family of origin impacts the relationships of the individual, even often times unconsciously, is a key component of Bowen Systems Theory. There are various ways in which this happens, not simply in initial formation but also in ongoing formation.

³⁰ United States Catholic Bishops, *The Basic Plan for the Ongoing Formation of Priests* (Washington, DC: US Catholic Conference, 2001), 18.

³¹ United States Catholic Bishops, *Program of Priestly Formation, Fifth Edition* (Washington, DC: US Catholic Conference, 2006), no. 88.

Professionally facilitated groups that focus on interpersonal dynamics can be effective instruments of human formation. Similarly, human formation can happen in the context of feedback, when individuals are helped to see and appreciate their impact in various situations, so that they can learn from that knowledge and confirm what is good and change what is less opportune.³²

The formation documents of the Church encourage the candidate and priest to understand himself, to be self aware and to use the insights of modern psychology to appropriate this. Bowen Systems Theory is one such tool that can facilitate such interpersonal growth of the pastoral leader.

1.6.3 Changing Understanding of Ministerial Priesthood

Edward Hahnenberg³³ points out three things can be said about Vatican II's teaching on the ordained priest who acts *in persona Christi capitis* (in the person of Christ the Head):

1. Claiming that bishops and presbyters act *in persona Christi capitis* allowed the Council participants to extend the priest's representation of Christ beyond the eucharistic consecration to his broader pastoral ministry.
2. Relating the priest to Christ the head suggested a stronger relationship between the ordained minister and the body of which Christ is the head, namely, the church community.

³²United States Catholic Bishops, *The Basic Plan*, 25.

³³ Edward P. Hahnenberg, *Ministries: A Relational Approach* (New York: Crossroad Publishing Company, 2003), 52-53.

3. Since acting in the person of Christ the head of the church is reserved to presbyters and bishops, this phrase clarified the distinction between the priest's unique representation of Christ and the representation of Christ evident in every baptized person.

Numerous popes, including Pius XII, John XXIII and Paul VI, have often used the image of a shepherd to describe the ideal priest in their allocutions to seminarians and priests. Following the Council John Paul II in *Pastores Dabo Vobis (I Will Give You Shepherds)* uses this image for the title of his apostolic exhortation following the International Synod of Bishops in 1990. "I will give you shepherds after my own heart" (Jer 3:15). In these words from the prophet Jeremiah, God promises his people that he will never leave them without shepherds to gather them together and guide them.

John Paul II sums up the role of the priest. "In a word, priests exist and act in order to proclaim the Gospel to the world and to build up the Church in the name and person of Christ the Head and Shepherd."³⁴ In this exhortation John Paul II offers to those charged with seminary formation the framework by which to form men for the priesthood. The future priest participates in the process of priestly formation by configuring his life to that of Christ, forming himself through the fourfold process of engaging the human, intellectual, spiritual and pastoral formation of his life in light of the example of Christ. This is a lifelong task only begun while a man is in the seminary.

³⁴ John Paul II, *I Will Give You Shepherds (Pastores Dabo Vobis)* (Vatican City: Libreria Editrice Vaticana, 1992), no. 15.

1.7 Formation to Ministerial Priesthood

Leading up to the ordination of the priest, there are theological studies, spiritual formation, and reflection upon the working of God within the individual. As noted earlier, in his exhortation John Paul II develops four different yet related areas of formation for both initial and ongoing formation:³⁵ human, spiritual, intellectual and pastoral. Bowen Systems Theory has more substantial application to the human and pastoral formation. However, I want to recognize the intellectual and spiritual dimensions as well.

1.7.1 Human Formation

The first aspect of formation to priesthood is rooted in human development. As one vocation director would often say to prospective candidates, “you can only know God as well as you know yourself!” thus implying that the candidate had to know himself as a human being before he could know God. Thomas Aquinas would say “grace builds upon nature.” Because grace builds upon nature the candidate must know himself, before he can know God and the grace of God at work in his life. From self knowledge the priest then relates to those he serves. Pope John Paul speaks of the fundamental importance to have the “capacity to relate to others,”³⁶ and cites it as one of the “most eloquent signs and one of the most effective ways of transmitting the Gospel

³⁵ John Paul II, *Pastores Dabo Vobis*, no. 42.

³⁶ John Paul II, *Pastores Dabo Vobis*, no. 43.

message.”³⁷ At the same time he recognizes that “the very family situations in which priestly vocations arise will display not a few weaknesses and at times even serious failings.”³⁸

A relationship with God does not begin with ordination. There must be a foundation upon which ordination builds. I have come to understand that walking in the home of a grieving family, it is not any words or rituals that I bring with me that provides comfort. Rather my presence, as a believer in the God who allowed his Son to suffer, to die and raised him from the dead, is the deeper level that this family and the gathered neighbors look to for comfort and healing. As they look to me at this moment, I feel the iconic nature of the priesthood. The Bishops note that priests exist in the world in three principal ways that are interrelated:

1. Priests exist as human beings.
2. They also exist as believing Christians or disciples of Jesus Christ in his Church.
3. Finally, they exist in a unique sacramental mode, as part of the order of presbyters in the Church.³⁹

How I relate and interact with a grieving family as a human being begins a process of healing for the family and becomes the work of priesthood. As noted earlier in this paper, the Council makes a rather dramatic change in no longer seeing the priest as the cultic man, set apart from the people. The Council looks at the priest as no longer

³⁷ Ibid.

³⁸ Ibid., no. 44.

³⁹ United States Catholic Bishops, *The Basic Plan*, 13..

segregated from or set over people, but among the people, yet all the while with a distinctive role.

The United States Catholic Bishops root the identity of priests in the humanity of the personhood of the priest. “Priests are, first of all, human beings whose very humanity ought to be a bridge for communicating Jesus Christ to the world today. Their humanity reflects a complex make-up, the different dimensions of what it means to be human. Each dimension needs recognition and attention.”⁴⁰ The Bishops describe the importance of the priest’s relationship with God and also explain they do not exist simply to fulfill a “specific religious role in society,” but rather describe the interrelationship of these factors that contribute to the complexity of the priest.

1.7.2 Spiritual Formation

Human formation leads to and finds its completion in spiritual formation: “For every priest his spiritual formation is the core which unifies and gives life to his *being* a priest and his *acting* as a priest.”⁴¹ The emphasis is original and underlines the integration of the priest’s life in being who he is called to be and fulfilling his mission.

1.7.3 Intellectual Formation

Intellectual formation aims to deepen the understanding of faith. It seeks to link theoretical knowledge with a practical wisdom, so that priests can serve their people

⁴⁰ Ibid.

⁴¹ *Pastores Dabo Vobis*, no. 45 as quoted in *Program of Priestly Formation*, 106.

more effectively.⁴² To use Bowen Systems Theory, for example, one first has to know and understand it and then have the willingness and the capacity to integrate it into one's life. Obviously this is a lifelong process.

1.7.4 Pastoral Formation

John Paul II exhorts that all of formation “must have a fundamentally pastoral character.”⁴³ Quoting *Optatam Totius*, he says that the whole purpose of training is to form “true shepherds of souls after the example of our Lord Jesus Christ, teacher, priest and shepherd.”⁴⁴

Pastoral formation entails the development of skills and competencies that enable priests to serve their people well. Bowen Systems Theory is a resource that allows a person to integrate and apply skills and competencies that lead to a new way of seeing, thinking and leading. The result is a more effective way of exercising pastoral leadership. “It is a question of a type of formation meant not only to ensure scientific, pastoral competence and practical skill, but also and especially *a way of being* in communion with the very sentiments and behavior of Christ the Good Shepherd.”⁴⁵

The aim of pastoral formation as described by the U.S. Bishops to develop a “true shepherd” who teaches, sanctifies and governs or leads, implies that the formation of the

⁴² United States Catholic Bishops, *The Basic Plan*, 26..

⁴³John Paul II. *I Will Give You Shepherds (Pastores Dabo Vobis)* (Vatican City: Libreria Editrice Vaticana, 1992), 35.

⁴⁴ Ibid.

⁴⁵ Ibid.

individual must include a number of essential elements. Among these elements are leadership development and the cultivation of personal qualities. Unfortunately from my perspective the leadership development they describe is really about acquiring the “basic administrative skills,” including managing the physical and financial resources of the parish.”⁴⁶ These are the tasks that can be delegated whereas the more important leadership development I have learned is through understanding the parish as an “emotional system” which leads me to view pastoral leadership through the lens of Bowen Systems Theory.

The Bishops describe pastoral formation as the “goal that integrates”⁴⁷ human, spiritual and intellectual formation. They also acknowledge in The Basic Plan for the Ongoing Formation of Priests that the “real opportunity to learn and cultivate such pastoral competencies and skills is after ordination, when the opportunity for application and practice becomes available.”⁴⁸

1.8 Reflection on My Experience

As I reflect upon my own experience of priesthood there is tremendous support not only from my relationship with God but also from my relationship with God through the people I am called to serve. It is the simple embrace of the people I am

⁴⁶ United States Catholic Bishops, *Program of Priestly Formation*, 81.

⁴⁷ Ibid, 82.

⁴⁸ United States Catholic Bishops, *The Basic Plan*, 28.

called to serve. Though I have learned that I represent something much larger than myself, I have come to understand that I cannot try to be something or someone I am not. I must be first and foremost rooted in my humanity. The Roman Catholic Church teaches that “through the sacrament of holy orders, through priestly ordination, priests not only assume new responsibilities and functions in the Church and world, they exist differently in and for the Church and the world. This different existence that gives rise to a specific identity has its sacramental foundation in a new relationship with Jesus Christ, a relationship that is lived out in a presbyterate and that, in the Western church, has become intimately connected to consecrated celibacy.”⁴⁹

Quoting from an angelus address of January 14, 1990, John Paul II acknowledges that “it is equally certain that the life and ministry of the priest must also adapt to every era and circumstance of life.”⁵⁰ The shift from the cultic notion of priesthood to the ministerial priesthood is also reflected by the questions John Paul raises for the Synod fathers when they came together to reflect on the priesthood: “What are the positive and negative elements in socio-cultural and ecclesial contexts which affect boys, adolescents and young men who throughout their lives are posed by our times, and what *new possibilities* are offered for the exercise of a priestly ministry which corresponds to the gift received in the Sacrament and the demands of the spiritual life which is consistent

⁴⁹ Ibid, 15.

⁵⁰ John Paul II, *Pastores Dabo Vobis*, 269.

with it?⁵¹ Such “new possibilities” present a wonderful opportunity for the priest to develop a new way of thinking, seeing and exercising pastoral leadership. In part three of this thesis, I will develop these possibilities in terms of the valuable insights that come through the lens of Bowen Systems Theory and shed light of this new understanding of pastoral leadership.

Since the time of the Second Vatican Council there has been tremendous change and growth in ministry within the local parish and in the understanding of the role of the priest as pastoral leader. The Council brought forth a renewed ecclesial understanding of the Church, and one that emphasizes the sharing of the gifts of all the baptized as the key to a vast project of ecclesial renewal. In a remarkable passage that foreshadowed the challenges to today’s pastoral leader, the Council insisted that in order to minister effectively, pastors must be prepared to “break new ground in pastoral methods.”⁵²

The Council’s wisdom resonates deeply within me, a post-Vatican II priest. To minister effectively today, a pastoral leader needs to master ministerial approaches that simply were not required by previous generations of pastors. I have found Bowen Systems Theory to be one particularly fruitful way to understand the need for a leader to

⁵¹ Ibid.

⁵² Second Vatican Council, *Presbyterorum Ordinis*, no. 13.

be “self-differentiated” so as to lead more effectively. In the next section of this thesis I will provide an overview of Bowen Systems Theory.

2. Bowen Systems Theory

2.1 Overview of Bowen Systems Theory⁵³

The second section will explain the conceptual framework of Bowen Systems Theory to set up part three, which will explore its application to ministerial leadership. In this section I will introduce the reader to the broad framework of Bowen’s theory, which includes eight concepts, focusing on the concepts that readily apply to pastoral leadership. I will help the reader understand how Dr. Murray Bowen developed a theory to understand the family as an emotional system, and how this theory has been applied specifically to pastoral leadership.

2.1.1 Development of a New Theory by Dr. Murray Bowen

In the 1950’s Dr. Murray Bowen, a psychiatrist working with schizophrenia patients at the National Institute of Mental Health, began discovering “new theoretical

⁵³ For a more detailed and scholarly understanding of Bowen Theory please refer to Murray Bowen *Family Therapy in Clinical Practice*, Lanham, MD: Rowman Littlefield Publishers, Inc., 2004.

ideas about schizophrenia.”⁵⁴ He initially worked with the individual patient, but then as he began to work with the mother, and then both parents and siblings, he came to realize that there were patterns in the way in which the family related to one another and each member of the family had an impact upon the other members. Over time as he worked with many families, this became the basis for development of a method for family therapy. As Bowen studied the relationship patterns in families with schizophrenia, “it was then possible also to see less intense versions of the same patterns in milder forms of emotional illness, as well as in normal people.”⁵⁵ Using these insights that he was learning from his professional practice, he also began to look at his own nuclear and extended family of origin. Throughout the decades of his continuing clinical practice he began to develop this theory that he acknowledges “contains no ideas that have not been a part of human experience through the centuries.”⁵⁶ What began as Family Systems Theory became known as Bowen Systems Theory in 1974 and has continued to evolve to help understand human behavior by viewing the family as an emotional unit.

Bowen made a conscious decision not to pursue the possible relationship between the theory and subjective subjects like theology, much less pastoral ministry

⁵⁴ Murray Bowen, *Family Therapy in Clinical Practice*, Lanham, MD: Rowman Littlefield Publishers, Inc., 2004, xiv.

⁵⁵ Ibid.

⁵⁶ Ibid., xiii.

and leadership. In responding to a presentation made at a 1987 conference on BFST and theology, Bowen states, "I'm not going to build a theory out of anything except what I would call objectivity, and these would be facts that can be weighed, proven and verified."⁵⁷ Bowen not only did not make application to ministry, theology or pastoral leadership, but in fact as stated above he avoided subjective matters such as theology. The primary resource and benefit of Bowen's theory to the leader is directly related to the insights and integration of the eight concepts to help the leader in his personal functioning rather than to the creation or adaption of any theological understanding.

2.1.2 Systems Thinking

"Systems thinking" is a way to describe the complex interactions in the family emotional unit. A fundamental premise is that each person in a family plays a role in the functioning of the other persons in the emotional system of the family. Bowen's theory is based on the *family* as the emotional unit rather than the *individual*. In other words, Bowen places the focus upon the emotional *system* of the individual rather than on the individual himself. As Roberta Gilbert states, "until Bowen Theory came along, most people had little or no idea about how to think about those automatic emotional processes of groups, so powerful in all of our lives."⁵⁸

⁵⁷ Murray Bowen, *Systems and Spirituality: Bowen Theory, Faith and Theology* (The Papers and Proceedings of a Conference on Theology, edited and published by Joseph C. Carolin, 1990), 23.

⁵⁸ Roberta M. Gilbert *The Eight Concepts of Bowen Theory: A New Way of Thinking About the Individual and the Group*, Front Royal, VA: Leading Systems Press, 2004, 2.

Bowen provides an understanding of the importance of *thinking* rather than *emoting*. In “thinking systems” each individual is aware of being part of a larger group and the impact each member has upon one another. This relates not simply to the emotional system of the family but to all systems. Each of the individual parts of the system has an impact upon the functioning of any part of the system, and the leader plays a significant role in the functioning of the other members of the organization. Rather than being causal thinking whereby A causes B, systems thinking focuses attention on how interactions are mutually influenced, even how they are patterned or repeated. These patterns help to keep a homeostasis or balance within the family or organization. Each member impacts the others. A system, including a family system, achieves a certain balance over time whereby there is “interdependency” among the parts. When one family member makes a change, for example, it upsets the balance of the family. The other members of the family will try to restore the balance. If one person begins to act in a more mature manner, the others may act more immature in order to bring things back into the balance they knew before.

2.1.3 Self Definition

Bowen describes all of his work within family systems therapy as helping “family members toward a better level of ‘differentiation of self’.”⁵⁹ He readily

⁵⁹ Bowen, *Family Therapy*, 529.

acknowledges that it is a lifetime of work. “One never becomes completely objective and no one ever gets the process to the point of not reacting emotionally to family situations.”⁶⁰ There are always those “triggers” in one’s life that cause one to emote or react instinctively. By moving towards a higher level of differentiation one becomes less reactive and more thoughtful in responding to potentially “trigger” events.

“Differentiation” is different from individuation or autonomy because it means both being a self and remaining connected to others. It means being clear about who I am and about my deepest values while remaining connected emotionally to family members, church members, especially the difficult ones who are most likely to pull the “trigger” on one’s reactivity.

Bowen encourages that the path to this higher level of differentiation of self is “to become a better observer” of one’s own emotional reactivity, so that rather than react instinctively, one can choose how to respond to a particular situation. Becoming a better observer and learning more about one’s family reduces the emotional reactivity and in turn helps one become a better observer of the dynamics at play to help the individual become more thoughtful and less reactive.

The more self defined the leader can become the more he will focus upon:⁶¹

self, not others,

⁶⁰ Ibid., 541.

⁶¹ Peter L. Steinke, *How Your Church Family Works: Understanding Congregations as Emotional Systems* (Herndon, VA: The Alban Institute, 2006), 124.

strength, not weakness,
process, not content,
challenge, not comfort,
integrity, not unity,
system, not symptom,
direction, not condition.

The more the leader can define herself, rather than be defined by others the better she will lead others. The more the leader focuses upon his own healthy functioning, the better he will be able to lead the organization entrusted to his care.

2.2 Concepts of Bowen Systems Theory

Bowen developed eight concepts that help to bring about a way of “thinking systems” and incorporating this theory into the life and learning of the leader. Rabbi Ed Friedman and others have used these concepts as the building blocks to understand a “systems thinking” approach to pastoral leadership. To be able to implore these concepts one must first have a working knowledge of them. Friedman summarizes the benefit of knowing the concepts or “laws of family process” in three ways. First, they provide criteria for information about one’s family of origin that is significant. Second, these concepts transcend culture and are equally applicable to families from any background. Third, these concepts are equally applicable to emotional processes in personal families and congregational families.⁶² Taken together they can be seen by observing emotional process in the family of origin or within the congregational family.

⁶² Edwin H. Friedman, *Generation to Generation* (New York: Guilford Press, 1985), 41.

I will provide the reader an overview of each of the concepts so that the ministerial priesthood can be viewed more thoroughly through the lens of Bowen's theory.

2.2.1 Nuclear Family Emotional System

In Bowen Systems Theory, the nuclear family unit rather than the individual is the emotional unit. Each member of the family has an impact upon the other members of the family. Whatever affects one member will affect others by the anxiety that moves from person to person within the family by means of patterned emotional reactions. Anxiety is usually defined as "the response of the organism to real or imagined threat."⁶³ Anxiety is an automatic response to a threat – real or imagined. It can be acute, meaning relatively short term, such as that which is generated by crisis or trauma, such as the loss of a significant relationship or the loss of job or home. Acute anxiety is situational or time bound. There is a heightened reaction to a stressor that occurs from within the individual or outside the family system. Anxiety can also be chronic, meaning that it is habitual, passed along in the family system for years or even generations. It is structured into the relationship itself or is perpetually present in someone. Chronically anxious people are easily triggered because of their sensitivity to anxiety, and usually have plentiful triggers.

⁶³ Roberta Gilbert, *Extraordinary Leadership: Thinking Systems, Making a Difference* (Falls Church VA: Leading Systems Press, 2006), 187.

Pastors deal with anxiety in people all the time as they are invited into the significant moments in the lives of their parishioners from birth to death, baptisms and funerals, first communion, confirmation, reconciliation, illness – each of the sacraments celebrates an intimate moment that are often times of anxiety for people. The same event can happen in two different families, and for one the way in which anxiety is handled creates tremendous tension and is high drama, while for the other it is just another day. When people are intensely anxious, they tend to be less resilient. Their functioning becomes more “either/or”, and there is blaming and a movement toward the extreme of fusion/togetherness or cut-off/distance. The leader, the parent or the pastor, by virtue of his position has a great impact upon the family system.

2.2.2 Scale of Differentiation

All human relationships exist in a tension between two basic forces – separateness or distance and closeness or fusion. Irrespective of culture or background, we live with two basic needs that we share in common – the forces for self and the forces for togetherness. Every relationship deals with how close to be with one another and how much distance to allow. For example, if one is too fused one may not have sufficient space to challenge the other and allow for differences. This is sometimes called “herding” or “group think.” If we are too distant, one may become isolated and cut-off and only see how different one is from another. Bowen called the balancing of these two forces the process of “self-differentiation.”

The “differentiation of self scale” is an effort by Bowen to assess the basic level in which a person is able to define herself rather than be defined by the group. As Bowen evolved in his thinking, so too did his understanding of this scale. The scale is hypothetical and goes from the least mature to the most mature. Bowen suggests that all human beings fall on this continuum, with no one higher than about 70 (out of 100). Where an individual falls on the scale depends largely on parents and previous generations, as well as one’s place in her family. The scale offers descriptors of more and less mature functioning. “People with a poorly differentiated ‘self’ depend so heavily on the acceptance and approval of others that either they quickly adjust what they think, say and do to please others or they dogmatically proclaim what others should be like and pressure them to conform.”⁶⁴ Bowen’s theory suggests that one who has higher “togetherness” needs is more likely to think with the group. It will be difficult for this individual to think for herself and take a stand against an opposing opinion. This person’s individuality will likely be less well-developed individuality and he will be lower on the scale.

Bowen describes high level maturity as demonstrated in one who has:

- the courage to define self,
- who is as invested in the welfare of the family as in self,
- who is neither angry or dogmatic,

⁶⁴ Michael E. Kerr, *One Family’s Story: A Primer on Bowen Theory* (Washington, DC: Georgetown Family Center, 2011), 7.

- whose energy goes to changing self rather than telling others what they should do,
- who can know and respect the multiple opinions of others,
- who can modify self in response to the group, and
- who is not influenced by the multiple opinions of others.⁶⁵

If one has a higher level of differentiation, it is because one is better able to define oneself, rather than be defined by others, in other words an individual who has more "self." This is illustrated by such "I position" stances as, "These are my beliefs and convictions." "This is what I am, and who I am, and what I will do, or not do." The basic self may be changed from *within* self on the basis of new knowledge and experience."⁶⁶ The leader who has a high level of maturity is going to be able to take a stand, even an unpopular stand and withhold the criticism that may come as a result of such a position.

Individuals who have higher levels of differentiation may or may not have fewer apparent social, psychological and physical symptoms and problems than others, but they are better equipped to deal with the crises of life. They have greater resiliency and recuperative powers, and are less stressed. While this scale is not an exact science, it is helpful in understanding the *process* of becoming more self defining or self differentiated. It also gives a way for leaders to look at this movement.

⁶⁵ Michael E. Kerr and Murray Bowen, *Family Evaluation: An Approach Based on Bowen Theory* (New York: Norton, 1985), 342-43 as quoted in Roberta M. Gilbert *The Cornerstone Concept: In Leadership, In Life* (Falls Church, VA: Leading Systems Press, 2008), 172.

⁶⁶ Bowen, *Family Therapy*, 473.

2.2.3 Triangles

Triangles are the building blocks, the smallest basic unit of an emotional system, the central way in which emotional process is both transmitted and stabilized in the emotional system. Triangles are not good or bad, but are simply a reality in all human systems. Observing triangles and the rules or natural laws they adhere to allows the leader to better observe the emotional system at work and to “see” how the anxiety between two people is being relieved by sharing it with a third party. No matter who the people are or what the context, emotional triangles adhere to the following rules:⁶⁷

- They form out of the discomfort of people with one another.
- They function to preserve themselves, and perversely oppose all intentions to change them.
- They interlock in a reciprocally self-reinforcing manner.
- They make it difficult for people to modify their thinking and behavior.
- They transmit a system’s stress to its most responsible or most focused (vulnerable) member.

Triangles abound in all relationships and organizations, including parish life, and are a natural way in which anxiety about an issue or within members is expressed. The more the leader can become aware of these basic rules and learn to think in terms of the many emotional triangles in which he finds himself, the more effective his leadership. Within the triangle there are three positions, usually two close to one

⁶⁷ Edwin H. Friedman, *A Failure of Nerve: Leadership in the Age of the Quick Fix*. (New York: Church Publishing, Inc., 2007), 206.

another and the third “distant” position. “Triangles support the major principle of systems thinking that it is *position* rather than nature that is the key to understanding our functioning in any family or work system.”⁶⁸ For example, when a leader is in a triangle with two subordinates, understanding which position of the triangle the leader is in (close or distant) will help her balance the relationship among them. Triangles first originate within the family of origin (mother, father, child), but they occur whenever people enter relationships.

The leader will not have the “luxury” of deciding whether or not to be in the triangle, but she will have the opportunity to choose how to manage her relationships within the triangle. Where he positions himself is significant: equal to both parties or closer to one or the other. By “thinking systems” and understanding the “push and pull” of the positions within triangle, the leader will be able to regulate, calm or at least reduce her reactivity by defining herself thoughtfully and clearly, thus being more objective about the issue or relationships. Friedman argues that “the concept of an emotional triangle describes clearly how self-differentiation can be a more powerful influence on others than any one technique or method for moving them forward.”⁶⁹ Understanding the concept of the triangle can be one of the most beneficial ways to “practice” self-differentiation.

⁶⁸ Ibid., 26.

⁶⁹ Ibid., 27.

There are differing perspectives on what constitutes a triangle. The view that is supported by the Bowen Center for the Study of the Family as of 2006, and most congruent with Bowen's theory according to the director at the time Michael Kerr, is as follows:⁷⁰

1. An emotional triangle is made up of three living people. It is a living, biological system (a pet, being a living being, may qualify as a potential third member of an emotional triangle). All three are emotional participants and are able to act and react to the other two members of the triangle.
2. A deceased person, idea, fantasy, institution, religion, or other nonliving concept or object is *not* considered part of an emotional triangle.

There are other practitioners of Bowen Theory, however, who allow for the concept of a "mental construct" triangle, which includes a living person and nonliving entities such as a deceased family member, a former pastor, or an idea or issue.

Friedman states, "an emotional triangle is formed by any three persons or issues."⁷¹ For him, the basic law of emotional triangles is that "when any two parts of a system become uncomfortable with one another, they will 'triangle in' or focus upon a third person, or issue, as a way of stabilizing their own relationship with one another."⁷² The issue can be money or an addiction for example, as a way of focusing upon a third to diffuse the intensity the other two in the triangle are experiencing.

⁷⁰ Peter Titelman, "The Concept of the Triangle in Bowen Theory: An Overview," in *Triangles: Bowen Family Systems Theory Perspectives*, ed. Peter Titelman (New York: Routledge, 2012), 25.

⁷¹ Friedman, *Generation to Generation*, 35.

⁷² Ibid.

2.2.4 Emotional Cutoff

For a leader to stay connected with people who are difficult or always critical is a challenge. It can also be demanding for the leader to manage his anxiety and relate to others when anxiety is high. A natural reaction can be to “cut off” from such people, to walk away, or simply to ignore them. The temptation of the leader can be to withdraw, walk a different hallway, stay out of the office, or escape by going on vacation. How a leader responds to such testing relationships by maintaining an appropriate balance will help determine the success of her leadership. “Emotional stuck-together fusion (closeness) and emotional cutoff (distance) are interrelated expressions of undifferentiation.”⁷³ Bowen sees emotional cutoff and its opposite “fusion” as two sides of the same coin. At one extreme, a person may be so fused with one’s parents or family that they never leave home. At the other extreme, a person may “cut off” from her family by moving to a different continent. “The person who runs away from his family of origin is as emotionally dependent as the one who never leaves home. They both need emotional closeness, but they are allergic to it.”⁷⁴ Understanding the pattern that has been learned from one’s family of origin will help a leader be thoughtful about her response to the difficult or critical person.

⁷³ Peter Titelman, “Emotional Cutoff in Bowen Family Systems Theory: An Overview,” in *Emotional Cutoff: Bowen Family Systems Theory Perspectives*, ed. Peter Titelman (New York: The Haworth Clinical Practice Press, 2003), 21.

⁷⁴ Bowen, *Family Therapy*, 382.

Bowen uses the term “emotional cutoff” to describe an emotional distancing. Bowen states that “the life pattern of cutoffs is determined by the way people handle their unresolved emotional attachments to their parents.” He goes on to say, “all people have some degree of unresolved emotional attachment to their parents.”⁷⁵ An emotional cutoff is the extreme form of separation from a family member when anxiety is high. When a relationship becomes too intense to the degree that a person can no longer manage or handle the anxiety, she will “cut off.” This can take the form of physical or emotional distance. A cutoff usually provides an immediate release from the intensity of the situation at hand and can even feel good, but has negative long-term ramifications. Bowen describes that when a child cuts off from a parent or both parents, this tends to begin a pattern that is repeated in other significant relationships. “The more intense the cutoff with the past, the more likely the individual to have an exaggerated version of his parental family problem in his own marriage, and the more likely his own children to do a more intense cutoff with him.”⁷⁶ In other words, emotional cutoff is about the emotional *process* – it is not about physical distance.

Fusion is the emotional stuck-togetherness between family members. Sometimes this is referred to as a “herd” mentality – what impacts one member of the family impacts them all. If one person is offended or upset, the whole family is. Fusion

⁷⁵ Ibid.

⁷⁶ Ibid..

functions to “ensure that the individuals within the nuclear family will remain attached to the emotional nucleus, usually the parents.”⁷⁷ It has been described as having the magnetic force of gravity, keeping all members of the family from falling away from the parent(s) or emotional nucleus, to which their survival and status in the family is bound. The greater degree to which one is fused with one’s family, leaves little possibility for self differentiation.

2.2.5 Family Projection Process

Family Projection Process helps respond to the question: How can children from the same family have such different levels of functioning? The answer is found in the basic triangle of parents and child. “The process through which parental undifferentiation impairs one or more children operates within the father-mother-child triangle.”⁷⁸ This concept helps one to understand why siblings who grow up with the same parents can be very different in their response to anxiety. It also helps underscore the significance of the hold that families of origin can have. This is often seen in families that readily blame others rather than take responsibility for their own functioning (or dysfunction as the case may be).

Children inherit many types of problems (as well as strengths) through the relationships with their parents, but the problems they inherit that most affect their lives are relationship sensitivities such as heightened

⁷⁷ Titelman, *Emotional Cutoff*, 22.

⁷⁸ Bowen, *Family Therapy*, 379.

needs for attention and approval, difficulty dealing with expectations, the tendency to blame oneself or others, feeling responsibility for the happiness of others or that others are responsible for one's own happiness, and acting impulsively to relieve the anxiety of the moment rather than tolerating anxiety and acting thoughtfully.⁷⁹

These relationship sensitivities do not go away but continue to live within the individual as she continues to relate out of her family of origin because one's reactive responses come from what one has learned within our family. Reactivity takes many forms. Family Projection Process locates the underlying cause of reactivity within the family of origin. For example, the parent might "project" his anxiety onto the child by excessive focus, what today one might call a "helicopter" parent, always hovering over his child. Worrying excessively, the parent transmits that anxiety to the child. Within the context of several children, one child may receive more focus than his other siblings. The other siblings receive less focus and, therefore, less anxiety is projected onto them and they are freer of their family emotional process.

Discovering a way to move closer to family, while at the same time being a separate self, is the task at hand. The challenge is to define self, to be self-differentiated, rather than be defined by one's family of origin. Ron Richardson asks the question: "Am I being the person I want to be in this situation, according to my best beliefs, values and

⁷⁹ Kerr, *One Family's Story*, 19.

intentions?"⁸⁰ For the leader to be able to respond to this question will help her be a better leader.

2.2.6 Multigenerational Transmission Process

As Bowen claims, "The family projection process continues through multiple generations."⁸¹ Just as children take on the anxiety and learned behaviors from their parents, the multigenerational transmission process explains how this is passed from one generation to the next. It can be fascinating to learn how the family tree grows and especially to explore the roots that go back many, many generations. Looking at the family tree with the lens of systems thinking explores the emotional process that goes alongside, seeing how this, too, gets passed down. Doing this within the family can be insightful and it can also be done within the congregation by looking at how leaders and significant staff members have entered and exited the organization they are called to lead.

The effects of major events within a society or within the world can also have an impact such as immigration, persecution, holocaust, famines, or economic reversals. In the book of Genesis' story of Isaac and Ishmael, "when taken to its multigenerational historical and metaphorical conclusion, led to the ossification of a cutoff between two

⁸⁰ Ron Richardson, *Becoming a Healthier Pastor: Family Systems Theory and the Pastor's Own Family*, (Minneapolis: Fortress Press, 2005), 77.

⁸¹ Bowen, *Family Therapy*, 384.

whole branches of a family: Israelis and Egyptians, Jews and Muslims” which has been passed down from generation to generation over thousands of years.⁸² Peter Titelman uses this story to illustrate that emotional cutoff in the family can, in some cases, lead to intense societal violence through the multigenerational transmission process. In the United States, the impact and effects of racism have been studied through the lens of multigenerational transmission process whereby racism continues to be passed down from generation to generation.

2.2.7 Sibling Position

Bowen has adapted the work of Walter Toman with the basic thesis “that important personality characteristics fit with the sibling position in which a person grew up.”⁸³ The basic idea is that people who grow up in the same sibling position predictably share important characteristics with each other. Toman’s research describes what could be considered typical patterns that exist precisely because of whether one is an older male or youngest female, male child with older sisters versus female child with younger brothers. Toman created eleven positions in the family and describes the characteristics of such sibling position.

⁸² Titelman, *Emotional Cutoff*, 38.

⁸³ Bowen, *Family Therapy*, 385.

2.2.8 Societal Emotional Process

Bowen saw that society is more or less anxious at different times in history. In times of societal regression, there is more chronic anxiety, which leads to more problems in society or societal regression. Initially Bowen called this concept “societal regression.” He later changed it to “societal emotional process” which “describes how the emotional system governs behavior on a societal level, promoting both progressive and regressive periods in a society.”⁸⁴ Bowen took his theory about the family and applied it to society as a whole. He recognized that just as a family can progress and function more effectively, so, too, can a society. Conversely, as a family can regress and function less effectively, so, too, can a society.

West Side Story’s “Gee Officer Krupke” can be seen as a parody of what Bowen is getting at with this concept. Bowen discovered during the 1960s the courts were becoming more like “parents” of delinquent adolescents. The basic triangle of parent, parent, and child was moving beyond the family as parents sought outside intervention from societal agencies. Bowen saw this “downward spiral” in families dealing with delinquency as an “anxiety driven regression in functioning.” The symptoms included “a growth of crime and violence, an increasing divorce rate, a more litigious attitude, a greater polarization between racial groups, less principled decision-making by leaders, the drug abuse epidemic, an increase in bankruptcy, and a focus on rights over

⁸⁴ Kerr, *One Family’s Story*, 41.

responsibilities.”⁸⁵ Leaders do not lead in a vacuum but in the midst of a society that has an impact upon her leadership. No organization, including the Church, is exempt from the forces of societal emotional process.

The constant state of terrorism that we currently live with might be an example of such regression, from the reality of the devastation on September 11, 2001 to the 2014 Sochi Olympics’ fear of terrorism. Such “regression” is a gradual erosion of functioning at societal levels over time, evidenced by, among other things, increasingly emotionally driven *reactive* decisions that may or may not be based on facts. Ed Friedman described this as the “seat belt culture,” oriented towards safety rather than risk and adventure. “If a society is to evolve, or if leaders are to arise, then safety can never be allowed to become more important than adventure. . . Everything we enjoy as part of our advanced civilization, including the discovery, exploration and development of our country, came about because previous generations made adventure more important than safety.”⁸⁶ Leaders must be willing to risk and not be controlled or paralyzed by sustained *chronic anxiety*, which is a response to an “imaginary” threat that may or may not materialize, in contrast to *acute anxiety*, which is a response to “real” threat that will almost certainly materialize.

⁸⁵ Ibid., 42.

⁸⁶ Friedman, *Failure of Nerve*, 83.

To draw a distinction, “societal *progression*” is a process that has occurred during periods in which humans have been able to identify more clearly and factually what issues or problems need to be addressed, in contrast to making anxiety-driven decisions about less relevant matters. During periods of progression, the sciences often flourish and the bases for decision-making are often supported by relevant, demonstrable facts coming from advances in scientific knowledge. Friedman describes three facets of the discovery process that set the stage for moving into the future: “the ultimate unimportance of mistakes when the quest is driven by adventure rather than certainty; the importance of serendipity in freeing oneself from one’s own thinking processes; and the will to overcome imaginative barriers, like the equator.”⁸⁷ Friedman’s understanding causes me to reflect about this from the perspective of a “spirituality of failure” in which mistakes and failures are expected on the road to discovery. A leader will need to develop just such a spirituality.

2.3 Critique of Bowen Systems Theory

While I am a grateful recipient of Bowen Systems Theory and find it to be a helpful lens with which to view pastoral leadership, I am also aware that it is not the only lens, and in fact can be misconstrued or even distorted. Bowen Theory is not a

⁸⁷ Ibid., 43.

quick fix. For example, it has taken me many years to simply begin to comprehend how best to benefit from a systems perspective.

Bowen Theory can be misread as a way to develop leadership skills or a quick fix or simple technique for handling conflict. In what Friedman calls the age of the “quick fix”, Bowen Theory is counter-cultural because it requires a great deal of self reflection. Murray Bowen warns against using Family Systems Theory as a technique or an ideology. The lens of Bowen Theory is the perspective of the challenging and personal work of family of origin with a focus on changing self, not changing the system – counter intuitively by changing self, the system will slowly adapt.

Bowen Theory has received criticism in that it has “male defined” terminology, and therefore is lacking in attention to feelings or emotion that are generally considered the feminine dimension. “It is asserted that Bowen's therapy focuses on being rational and objective in relation to emotional processes, which relegates to a low priority the expression of emotions in therapy.”⁸⁸ This could be a limitation that has not progressed in terms of understanding the influence and impact of gender since Bowen began developing his theory in 1950.

The Bowen Center for the Study of the Family at Georgetown University is committed to ongoing research in the science of human behavior. One of the challenges

⁸⁸Jenny Brown, “Bowen Family Systems Theory and Practice: Illustration and Critique” accessed March 24, 2014, <https://www.familystraining.com/papers/bowen-illustration-and-critique.html>.

of the ongoing research into Bowen Theory is developing the research because once “the research view shifts from the individual to the family, the scene looks entirely different and research doesn’t employ cause-effect linear models. This makes research from a systems perspective somewhat complex.”⁸⁹ It would be easier if the focus was simply on an individual, because to measure the presence or absence of a symptom in just one family member denies the family systems perspective. By its nature the theory involves multiple variables that can each impact the system.

2.4 Application of Bowen Systems Theory in Different Settings

Bowen Family Systems Theory grew out of a theory of human behavior that Murray Bowen developed as a way to understand people. The theory is based on scientific principles about relationship systems that are universally applicable to any context in which people enter into relationships with one another. This universal applicability has allowed Bowen’s theory to be developed and applied in many directions. The Bowen Center for the Study of the Family continues the work and legacy of Murray Bowen by leading the development of Bowen Theory “into a science of human behavior and to assist individuals, families, communities, and organizations in

⁸⁹ Research at the Georgetown Family Center accessed March 24, 2014 at www.thebowencenter.org/pages/research.

solving major life problems through understanding and improving human relationships.”⁹⁰

There is extraordinary diversity and breadth to Bowen Theory’s applications, including how human functioning can be viewed in various relationship systems across a broad spectrum of professions, disciplines, cultures, and nations. In 2011, Bregman and White edited a collection of papers by Bowen practitioners which demonstrates the many ways in which Bowen Theory has diverse applications. This book’s essays are but one example of “the breadth of systems thinking applications to human behavior by way of Bowen Theory.”⁹¹ By putting together a collection that represents this broad spectrum, the authors provide evidence that Bowen Theory has “joined an elite class of theories that have enjoyed broad application to social phenomena”⁹² such as psychoanalytic theory, feminist theory, Marxism, and evolutionary theory. They therefore claim that Bowen Theory is one of the 20th and current century’s most significant social-behavioral theories.

The business world has also applied Bowen’s scientific theory outside of the therapeutic setting. There are practitioners who have used Bowen’s work as the basis

⁹⁰ “Mission of Bowen Center” Accessed March 8, 2014. <https://www.thebowencenter.org>

⁹¹ Charles White, preface to *Bringing Systems Thinking to Life*, ed. Ona Cohn Bregman and Charles White (New York: Routledge, 2011), xv.

⁹² Ibid.

for understanding leadership and the challenges that leaders face.⁹³ Leadership coaching is a prime example of using an integrated understanding of the eight core concepts of Bowen Theory to help the leader understand and grow in awareness of the powerful presence he brings to his position. Because Bowen's work is grounded in scientific principles, these eight concepts can help a leader understand how larger systems' forces take place in living organizations, including business entities.

2.5 Application of Bowen Systems Theory to Pastoral Leadership

Speaking in 1991 shortly after Bowen's death, his close colleague Dr. Michael Kerr expressed the belief that "Bowen Theory will gradually alter how psychiatry and all of medicine is practiced."⁹⁴ Kerr predicted that the theory's impact will go far beyond medicine and be seen to have relevance in many differing social problems and situations. I concur with Kerr. Bowen's theory provides a lens, or way of thinking not just about leadership but about the unique challenges of pastoral leadership in ministry. I have found that Bowen Theory provides a language and frame of reference for

⁹³ Examples of application in the business world can be seen in books such as: Bob Duggan and Jim Moyer, *Resilient Leadership: Navigating the Hidden Chemistry of Organizations* (West Conshohocken, PA, Infinity Publishing Co., 2009); Leslie Ann Fox and Katharine Gratwick Baker, *Leading a Business in Anxious Times: A Systems Approach to Becoming More Effective in the Workplace* (Chicago: Care Communications Press, 2009); Mary Beth O'Neill *Executive Coaching with Backbone and Heart: A Systems Approach to engaging Leaders with their Challenges* (San Francisco: Jossey-Bass, 2007).

⁹⁴ Michael E. Kerr, "An Obstacle to 'Hearing' Bowen Theory," in *Bringing Systems Thinking to Life: Expanding the Horizons for Bowen Family Systems Theory*, ed. Ona Cohn Bregman and Charles M. White (New York: Routledge, 2011), 61.

understanding human functioning in relationships that pertains to all aspects of the ministerial priesthood from baptism and “last rites,” to preaching and leading worship, including individual counseling, pastoral care and taking courageous counter-cultural stands rooted in the gospel and Catholic Social Teaching.

Nearly every aspect of pastoral ministry may be informed through the collective lens of Bowen Theory’s eight concepts. Pastors by their nature are involved in significant moments in the lives of the families within their parish. From a systems theory perspective this means that pastors are involved at many levels in the emotional systems of the people to whom they minister, the pastoral staff they lead, and most significantly the emotional system in which they grew up.

2.5.1 Friedman’s Application of Bowen Systems Theory to Congregational Life

Rabbi Edwin Friedman, the leader of a Jewish congregation and practicing psychotherapist, made connections and application from Bowen’s theory to the congregation. His ministry within his synagogue included ministering and witnessing the families of his congregation grow, change and mature throughout the life cycle. At the same time, in his counseling practice Friedman was seeing clergy from religiously diverse congregations yet with similar leadership challenges. As Friedman reflected upon the moments of significant life events from birth to death and the defining moments in between, including marriage and illness, he was drawn to apply what he

was learning in his counseling practice to the dynamics of pastoral leadership.

Specifically, Friedman connected the emotional growth and maturity of the pastor and their self-definition or self-regulation to their pastoral leadership.

Friedman recognized that a church or synagogue has an emotional system similar to a family. As he made connections with several of the concepts of Bowen's theory, he integrated them into his leadership of the synagogue. This way of understanding pastoral leadership, he discovered, is rooted in the pastoral leader's understanding of the emotional system of his family of origin, and the influence it can have on the effectiveness of the leader within his congregation or parish. Friedman makes a compelling case to the way that Bowen Theory provides a lens for more clearly understanding ministry situations and specifically the functioning of the pastor as he leads the congregation.

Over the past twenty-five years, a growing number of resources grounded in Bowen Theory have been developed for congregational leaders. In addition to Friedman's works, Peter Steinke, Ronald Richardson, Roberta Gilbert, Israel Galindo, and Margaret Marcuson (among others) have written books that apply Bowen Theory to congregational life.⁹⁵ These authors are not the theoretician that Bowen was, but they

⁹⁵ Steinke, *How Your Church Family Works*; Ronald Richardson, *Creating a Healthier Church: Family Systems Theory, Leadership, and Congregational Life* (Minneapolis: Fortress Press, 1996); Gilbert, *Extraordinary Leadership*; Israel Galindo, *The Hidden Lives of Congregations* (Herndon, VA: Alban Institute, 2006); Margaret Marcuson, *Leaders Who Last: Sustaining Yourself and Your Ministry* (New York: Seabury Books, 2009).

have taken Bowen's ideas and have adapted them to the functioning of the emotional system of the synagogue or church. They have provided a new way of thinking about human interactions within the emotional system of the congregation and applied Bowen's work to pastoral leadership, recognizing that congregational life is made up of families who each have their own family system. "Emotional process in personal families is equally applicable to emotional process in churches, synagogues, rectories (which function as nuclear systems), and hierarchies (which function as extended systems)."⁹⁶ This is particularly true within Catholicism, which is not only hierarchical but also set up like a family with the priest called "father" and vowed religious called "brother" and "sister."

Friedman in particular applies a systems approach directly to congregational leadership. He sets forth as his thesis in his groundbreaking book, *Generation to Generation*, that "clergymen and clergy women, irrespective of faith, are simultaneously involved in three distinct families whose emotional forces interlock: the families within the congregation, our congregations, and our own."⁹⁷ He further states:

Employing the models and approaches of the relatively new field of family therapy, this work will demonstrate how the same understanding of family life that can aid us in our pastoral role also has important ramifications for the way we function in our congregations, for our position in our own personal families, nuclear and extended, and for the entire range of our emotional being.⁹⁸

⁹⁶ Friedman, *Generation to Generation*, 195.

⁹⁷ Ibid., 1.

⁹⁸ Ibid., 1-2.

My experience as a Catholic Pastor proves this interrelationship of families to be true. I have my family of origin, the families of my parish, and the family of my Franciscan brothers and these “families” impact one another.

3. Pastoral Leadership Through the Lens of Bowen System Theory

3.1 Break New Ground

A remarkable passage from *Presbyterorum Ordinis* insisted that in order to minister effectively as “rulers of the community” pastors must be prepared to “break new ground in pastoral methods.”¹ The Council’s wisdom and renewed understanding of the ministerial priest resonates deeply within me, a post-Vatican II Roman Catholic pastor. To minister effectively today as a leader of the community, I need to break new ground and master pastoral approaches that simply were not required by previous generations of Catholic pastors.

While training to sail as a young boy off the coast of Beach Haven, NJ, I learned that I had to be aware of and respond to multiple forces and dynamics in order to navigate and sail a true course. Mastering the art of sailing wasn’t just about how to tack and when to jibe. It was also how to head into the wake of passing boats and (often!) how to right the boat after capsizing. In fact, becoming a real sailor meant becoming aware of all of the forces swirling around me. Long before I discovered how to name it, I was learning that I had to “think systems” in order to meet with success. Early in my pastorate, I relearned this invaluable lesson when I was introduced to Bowen Systems Theory and discovered how its insights could help me be a more effective pastoral

¹ Second Vatican Council, *Presbyterorum Ordinis*, no. 13.

leader. “Systems thinking” means that I must be aware of much more than just the prevailing winds and the occasional thunder in the distance. It has taught me to pay attention to subtle dynamics of emotional systems, to understand the “universal laws” of relationship networks, to recognize how I can leverage my position as leader in a more nuanced way, and to refuse to settle for simple solutions to complex challenges.

In this third part I will select a number of key themes that I believe are important for the effective exercise of pastoral leadership in a 21st century environment. My method will be first of all to highlight some aspect of the renewal of the Church and its understanding of priestly ministry related to the theme through the teachings of the Second Vatican Council and subsequent documents of the Magisterium. Secondly, I will relate this evolution of Catholic theology and the practice of priestly ministry to relevant aspects of Bowen Systems Theory in a way that reveals not only their compatibility with Catholic theology but also the synergies that are possible from their integration into priestly ministry. And, finally, I will reflect on how I have attempted to integrate these two sources into my own understanding of effective leadership in my ministry as a Roman Catholic pastor.

3.2 Change

3.2.1 Vatican II

Change management is one of the most challenging and important aspects of leadership in any organization. Within a few short months of his selection as Pope, John

XXIII announced his intention to convoke an Ecumenical Council. By describing the work of the Council with the word *aggiornamento*, he made clear his intention to set the Church on a course of great change. How great the change would only gradually become known over time. The Council came as a surprise to many – John was expected to have a reign of short duration, yet after only a few months he called the extraordinary ecclesial gathering of an Ecumenical Council, the Church’s most solemn and highest teaching authority. While some welcomed it, there was also strong reaction against the Council. Cardinal Lercato expressed his outrage: “How dare he summon a council after one hundred years, and only three months after his election? He called John ‘rash and impulsive,’ inexperienced and lacking in culture.”² Even John’s friend who would eventually become his successor as Paul VI remarked: “This holy old boy doesn’t seem to realize what a hornet’s nest he’s stirring up.”³ John did not let his detractors or critics change his mind or lessen his resolve to set the Church on a new direction, a direction that would inevitably involve great change. I suggest there were two primary reasons for this.

Firstly, despite forces resisting his decision, John’s calling of the Council was a defining moment of his pontificate. His was a self-differentiating act of the highest order. As one of his biographers, Thomas Cahill, describes, John made the decision to

² Thomas Cahill, *Pope John XXIII* (New York: Penguin Putnam Inc., 2002), 179.

³ Ibid.

call a council after great thought and prayer. His decision was grounded in reflection and limited dialogue with a few trusted advisors. He spoke of a council to his confessor, Cahill writes, and also suggests John was likely thinking about the possibility of calling a council and what it could accomplish even began before his election as pope.

Secondly, he articulated a clear vision for the Council and what he hoped it would accomplish. John was able to go forward with the Council, despite his critics and those who were against the idea because he was clear about his vision for what the Council could accomplish: "The greatest concern of the Ecumenical Council is this: that the sacred deposit of Christian doctrine should be guarded and taught more efficaciously."⁴ He grounds his reasoning in what he sees as an unchanging, ongoing predicament. He connects the Council with the past: "The great problem confronting the world after almost two thousand years remains unchanged."⁵ He goes on to describe this problem as an inattention to Christ as the center of history and of life in which humanity has given rise to "confusion, to bitterness in human relations, and to constant danger of fratricidal wars."⁶ And he leads into the future by "bringing [the Church] up to date where required."⁷ By being clear as to his vision, John takes the

⁴ Second Vatican Council, *Pope John's Opening Speech to the Council*, 713.

⁵ *Ibid.*, 711.

⁶ *Ibid.*, 711.

⁷ *Ibid.*, 712.

focus off himself and places it on the mission of the Church, which is its pastoral outreach and the fullness of “Christian charity.”⁸

John thus sets in motion a Council that will bring about a renewed Church and will require of all Catholics a deepening of their lives of faith; a full, conscious and active participation in worship; a new challenge to learn more about scripture and their faith; and a greater participation in the corporal works of mercy and the life of the Church. This global meeting of the world’s bishops would have local ramifications. All Catholics would be impacted by the Council and the change that it would bring. As a consequence, it was not just John XXIII who needed to be a self-differentiated leader ushering in change; so, too, every local pastor responsible for implementing the Council’s changes and leading the faithful to a new vision of Church would be required to be a self-differentiated leader.

3.2.2 Bowen Systems Theory

Central to Bowen Systems Theory’s understanding of leadership is a focus upon self rather than on others and on one’s strength rather than weakness. Friedman, for example, suggests that effective leaders should not focus upon technique, skill development, or how to motivate subordinates or manage one’s boss. Rather, he points

⁸ Ibid., 716.

out that “the power of all leaders resides in their *presence, the nature of their being*.”⁹ Friedman insists that, especially in an information age, it is more important for the leader to be “well defined,” rather than “well informed.”¹⁰ Friedman’s writings encourage the leader to become “better defined” and thereby better equipped to deal with the “fall out” of the changes that leadership by its nature brings about. Friedman describes this “fall out” from the leader’s introduction of change and upsetting the homeostasis of the family, church or organization as “sabotage.” Sabotage, as Friedman uses the term, is most often not deliberate or even conscious. Rather, it is instinctive, a predictable phenomenon related to how systems “naturally” respond to change. The principle of homeostasis means that any system will work to keep the status quo, to maintain its current balance. But a leader’s concerted effort, even in the face of resistance and reactivity, can eventually bring change to a system. It is the leader’s persistence and stamina, Friedman asserts, that will make the change successful in the end. “The very presence of differentiation in a leader will stir up anxious response. And staying in touch with the capacity to understand and deal effectively with this system is – beyond vision, beyond perspicacity, beyond stamina – the key to the kingdom.”¹¹ In making difficult or even prophetic decisions as John XXIII did, Bowen Theory anticipates that there will be “push back” and resistance, and that the leader’s

⁹ Edwin H. Friedman, *Reinventing Leadership: Discussion Guide* (New York: Guilford Press, 1996), 3.

¹⁰ *Ibid.*, 4.

¹¹ Friedman, *A Failure of Nerve*, 186.

role will require self-differentiation to stay the course, to have a clear vision focused upon the mission.

3.2.3 Reflection on My Experience

Bowen Systems Theory uses the phrase “differentiation of self” to describe two lifelong tasks: the healthy integration of our internal functioning and achieving a balanced way of relating to the world around us. On a practical level, I’ve come to understand how differentiation of self requires that as pastor I continually work on issues such as the following. I should:

- be clear—for myself and for others—about my pastoral vision for the parish;
- maintain a non-anxious, calming presence that minimizes reactivity and promotes greater thoughtfulness (and collaboration) within the community;
- strike just the right balance in how I deal with situations that often involve highly polarized positions; and
- establish and maintain appropriate boundaries, both personally and professionally.

One of the first things I learned as pastor was that encountering resistance is an inevitable consequence of exercising effective leadership. We are part of a society – the Catholic Church included where reactivity, blaming behaviors and an either-or, them vs. us approach to problems often characterize our response to challenging situations. Change naturally raises people’s anxiety, and in a parish there are always those who are most comfortable if they can keep things “the way they’ve always been.” However, because the role of pastor is in large part to lead change that produces new growth and

development, I have learned that reactivity and resistance should be expected. When I have encountered resistance and even sabotage in my efforts to lead change within the parish, it has been helpful to be mindful of Friedman's observation that "the resistance that sabotages a leader's initiative usually has less to do with the 'issue' that ensues, than with the fact that the leader took initiative."¹²

The parish I pastor began with 200 households in 1982 and has grown to about 5,000 households in 2014. Each time that the parish's Master Plan was updated, it also involved purchasing contiguous property in order to expand. And each time there were those who said "Enough!", "We're big enough," or "Start a new parish." I have come to recognize how easy it is to take personal offense at the loyal opposition's disagreement and criticism. I have also learned how important it is to "think systems" and remember that pushback is a natural phenomena that accompanies any significant change initiative. After months of careful, highly collaborative work on the case statement for a major capital campaign, I quickly discovered this. My surprise was not that there was resistance and sabotage, but from where it came. Just as we were ready to announce a major capital campaign to finance our Master Plan, a key, highly influential pastoral staff member suddenly suggested that we needed to scrap all the plans and start over again. I recognized this was not an astute observation ("icebergs ahead"); rather, it was

¹² Ibid., 3.

an attempt to shout “fire” in a crowded room and scuttle the project. “Systems thinking” allowed me to remain calm, not take it personally, keep focused upon the larger vision, and carry through with our plans in a way that did not give energy to this anxious voice.

As we moved to construction, having just purchased land for the expansion, there was a rare plant found on the property that a group of parishioners both knowledgeable and sensitive to the environment desired to save. This would have meant a stop in both construction and the expansion of facilities. If we continued and put the rare species at risk, they suggested, we would be going against our expressed value of respect and care for creation. This group saw no option but to stop construction. I tried to maintain a calming influence and urged thoughtfulness. As a result, by taking a systems perspective, the building committee was able to look at other options including relocating the plant to a different part of the parish property where it could thrive. Because I understood that the resistance to change is natural, I was able to frame our dilemma in a way that helped other leaders thoughtfully to come up with alternative solutions that were sensitive to the environment. Thanks to the lens of “systems thinking”, the parish was able to continue our plans with a win-win solution and the result was a highly profitable campaign, a completed building project, and flourishing new pastoral ministries in keeping with the mission of the parish. Friedman says it well: “The pastor’s capacity to be prepared for, to be aware of, and to learn how

to skillfully deal with this type of crisis [sabotage] may be the most important aspect of leadership.” He concludes, “It is literally the key to the kingdom.”¹³

3.3 Ministerial Priesthood

3.3.1 Vatican II

Just as John XXIII’s *aggiornamento* set the Church at large on the course for great change, so, too, did the Vatican Council’s teachings on the nature of the Church and the priesthood result in great change for the role of the pastor of the local parish. The Bishops of the United States describe the parish this way:

The parish is where the Church lives. Parishes are communities of faith, of action, and of hope. They are where the gospel is proclaimed and celebrated, where believers are formed and sent to renew the earth. Parishes are the home of the Christian community; they are the heart of our Church. Parishes are the place where God’s people meet Jesus in word and sacrament and come in touch with the source of the Church’s life.¹⁴

In order to respond to this renewed model of the parish, the pastor’s role needed to adapt as well.

Several years after the close of the Council, Avery Dulles wrote a landmark book, *Models of Church*, which provides a good example of how theological reflection on priestly ministry was beginning to unpack the practical implications of the Council’s

¹³ Ibid., 247.

¹⁴ National Conference of Catholic Bishops, *Communities of Salt and Light: Reflections On The Social Mission Of The Parish* (Washington, DC: United States Catholic Conference, Inc., Fourth Ed., 1996), Introduction.

lofty teachings. He describes the Church “as a network of interpersonal relationships,”¹⁵ and also states “we cannot but be impressed by the rapidity with which, after a period of long stability, new paradigms have begun to succeed one another.”¹⁶ Anticipating the changes these new paradigms would bring about, the Council made the presbyter specifically responsible for the building up of the Body of Christ. Dulles, quoting from the Council, states: “The office of pastor is not confined to the care of the faithful as individuals, but is also properly extended to the formation of a genuinely Christian community.”¹⁷ The Council’s renewed understanding of the role of pastor demanded new ways for the pastor to respond to this change within the Church. The mission of the pastor has become one who is a gatherer of people and builder of community “where God’s people meet Jesus.”

Dulles’ writing provided a lens with which to reflect upon the renewed ecclesiology of the Council and, therefore, offers insight into the changing role that is required of the priest whose job it is to implement this renewed understanding of what it means to be Church. He notes, “Church leaders may be forced to assume a more personal and spontaneous style of leadership.”¹⁸ In going on to describe five differing but complementary models of Church, he readily acknowledges that there is no one

¹⁵ Avery Cardinal Dulles, *Models of the Church* (New York: Image Books, 2002), 22.

¹⁶ Ibid.

¹⁷ Ibid., 156.

¹⁸ Ibid., 153.

model or paradigm of church that will “solve all questions.” I would propose that he is also suggesting that there is no one model that comprehensively articulates the Council’s new understanding of ministerial priesthood. Taken together, however, with their individual strengths and weaknesses, Dulles’ five models provide insight into the effective leadership styles a contemporary pastor needs to draw upon to build the Body of Christ into a genuinely Christian community.

The Council provides for the priest a new way of understanding his role no longer set apart, but now providing leadership *within* the community to build up the Body of Christ. This means that a pastor’s leadership must be “combined with a large measure of lay participation and co-responsibility on all levels.”¹⁹ The ministerial priest continues to be at the same time the leader of prayer, celebrator of sacraments, and transmitter of “God’s gifts of grace and counsel”²⁰ to the people of God.

Dulles summarizes the post-Vatican II role of the priest and priestly office as including the “building of Christian community, presiding at worship, the proclamation of the word of God and activity for the transformation of secular society in the light of the gospel.”²¹ To faithfully fulfill this renewed understanding of the ministerial priesthood will require not simply breaking new ground in pastoral methods, it will also

¹⁹ Ibid., 155.

²⁰ Ibid., 158.

²¹ Ibid., 166.

require collaboration with the laity, and a new way of thinking systems to understand the many relationships that the pastor must enter into.

3.3.2 Bowen Systems Theory

A key insight of Bowen Systems Theory is that as one seeks to define himself, the “basic relationship patterns developed for adapting to the parental family in childhood are used in all other relationships throughout life.”²² This insight is the foundation upon which others such as Friedman have drawn attention to the connection between effective leadership and the leader’s own journey of self-differentiation. An individual’s effort to become more of a “self” in the sense described by Bowen Theory is inextricably linked to understanding and working on one’s relationship to the nuclear family. The “pull” of the relationship patterns one assimilates growing up last a lifetime. Unless a leader has become more self-aware and seen the extent and many ways that those relationship patterns play themselves out in subsequent life situations, he is far less able to separate the wheat from the chaff, to leverage the highly functional strengths inherited from previous generations and to minimize the dysfunctional patterns that handicap one’s efforts to lead effectively.

Understanding this from the perspective of ministerial leadership means that the basic relationship patterns that have been learned in the family in which the priest grew

²² Bowen, *Family Therapy in Clinical Practice*, 462.

up will tend to be replicated in his functioning as a pastor. The intensity of such patterns will be less than those manifested in his family of origin, but the patterns will nevertheless replicate themselves in parish life. For example, in stressful, emotion-laden situations, a pastor will likely make decisions in a more clear and thoughtful way that are best for the entire parish if he is not still “hooked” by family dynamics that were typically highly reactive in stressful situations. Such a pastor can easily become “stuck” and paralyzed by the thought of the conflict that he knows will arise if he brings about a needed but unpopular change that will destabilize the prevailing “balance” of the church system.

As discussed earlier, the “laws” governing how the emotional system of a family functions are also applicable to the functioning of the emotional system of a parish. “Religious institutions not only function like families, they also contain families.”²³ It is for this reason that Bowen Theory is applicable not only to the functioning of the pastor as leader, but to the parish as a family. This insight allowed Friedman to develop a way to understand ministerial leadership in the context of the overlapping “families” that a pastor is part of. “Leadership has inherent power because effecting a change in relationship systems is facilitated more fundamentally by how leaders function within their families than by the quantity of their expertise.”²⁴ This perspective correlates

²³ Friedman, *Generation to Generation*, 195.

²⁴ *Ibid.*, 2-3.

strongly with the criteria that the U.S. Bishops emphasize as crucial for effective ministerial leadership. In candidates for the priesthood they are “freedom, openness, honesty and flexibility, joy and inner peace, generosity and justice, personal maturity, interpersonal skills, common sense, aptitude for ministry and growth ‘in moral sensibility and character’.”²⁵ In a more secular context Friedman encourages leaders to “focus first on their own integrity and on the nature of their own presence.”²⁶ He understands leadership more as an “emotional” process rather than a “cognitive” phenomenon. For Friedman the well-differentiated leader must have “clarity about his or her own life goals,”²⁷ with the ability to think of Bowen Systems as a lens with which he can see what is beneath the surface, understanding the dynamics of emotional process as well as how the patterns of his own emotional process influence his exercise of leadership. Bowen Theory and the Church’s call for maturity in its leaders converge at this point and suggest strongly the value of pastoral leaders doing the work of self-differentiation, which includes work on their family of origin issues.

3.3.3 Reflection on My Experience

I was introduced to Bowen Theory and began to become an observer of my family system when I started working with a leadership coach. Following a “360

²⁵ United States Catholic Bishops, *Program of Priestly Formation*, no. 88.

²⁶ Friedman, *A Failure of Nerve*, 13.

²⁷ *Ibid.*, 14.

evaluation” of my role as pastor, the evaluator, a recently retired priest of the archdiocese of Washington, Bob Duggan, introduced me to a new way of looking at pastoral leadership. This new lens of understanding myself from the perspective of self-differentiation required me to work on my own level of differentiation. This eventually invited me to be a better observer of my own family system and the family system of the parish I was leading. Ron Heifetz uses the metaphor of getting up on the balcony to observe oneself below on the dance floor. He encourages the leader to achieve a “balcony perspective,” which means “taking yourself out of the dance, in your mind, even if only for a moment to gain both a clear view of reality and some perspective on the bigger picture by distancing yourself from the fray.”²⁸ I began to learn how to observe my functioning as a pastor and how many patterns in the way I was exercising ministerial leadership were rooted within my family of origin. I quickly discovered why learning to understand the role and impact of one’s family of origin on relationships whether they be personal or pastoral – is called “work!”

I was able to see the benefit of this work when I had to deal with a situation in which many families of the parish came together with considerable anxiety and reactivity around the topic of how children are best taught about human sexuality. My growing understanding of how my family of origin dealt with anxiety and reactivity –

²⁸ Ronald A. Heifetz and Marty Linsky, *Leadership on the Line: Staying Alive through the Dangers of Leading* (Boston: Harvard Business School Press, 2002), 53.

and how I had learned to operate in situations of heightened stress and anxiety – was invaluable in allowing me to function in a more thoughtful manner than would have been the case had I never gotten “up on the balcony” with regard to my nuclear family. Human sexuality education was a controversial topic in the local public school system, and a group of parents from the parish asked to meet and suggested that the richness of the Church’s teaching on this area is best presented through faith formation, not in the public schools. This made sense to me and so at my urging the parish faith formation team introduced a family life program throughout the parish’s faith formation programs beginning in fourth and fifth grades and continuing on through high school.

Most parents either welcomed or seemed indifferent to the program. Some parents, however, upon learning that our family life program included formation on human sexuality were outraged and complained vociferously, demanding the program be retracted immediately. The faith formation team and I were taken back by the reaction and reactivity that ensued. At a parental meeting I facilitated to learn more about the concerns of parents, I was surprised at the anger being directed at me. To take their anger as a personal attack would have been easy. However, getting “up on the balcony” from a systems perspective, I realized that the vitriol being expressed was not in proportion or in relation to the subject at hand. A match had been lit and the anxiety among the parents fueled highly reactive behaviors. Had I taken this personally, I likely

would have escalated their anxiety, and it would have been polarizing and paralyzing to moving forward.

As I listened to the parents and their concerns for their children, in my mind's eye I stepped onto the balcony to ask "What's underneath this energy?" This was about more than a curriculum for human sexuality. I became an observer and did not let the parents' anger hook me. I kept coming back to the vision for the program, and at one point I even made the observation "There's a lot of energy around this issue. I wonder why?" I did not take responsibility for the emotional reaction of parents, but focused on my own functioning. Some parents could not express themselves calmly, while others could disagree thoughtfully, articulating the aspects of the program they found helpful and those which they did not think age appropriate. A systems approach helped the formation team and me to listen and list the criticisms so that we could learn and improve the curriculum. We also planned listening sessions with a clear agenda as a way to stay connected with parents and thoughtfully plan a way forward. It took much longer than anticipated, but we eventually ended up with a stronger, more comprehensive human sexuality curriculum for the parish.

The ministerial priest is set apart from the people only in the sense that he is called to minister to the people of God, to serve and shepherd them into communion with one another and with Christ. Paying attention to the human, intellectual, spiritual and pastoral dimensions of a priest's life is not only important but imperative for his

healthy functioning. Of these four dimensions that are developed by the U.S. Bishops in their documents on the initial and ongoing formation of the ministerial priest, I will explore the human and pastoral dimensions because I find there a particularly strong correlation between the pastoral leadership of the ministerial priest and Bowen Theory.

3.4 Human Dimension of Ministerial Priesthood

3.4.1 Vatican II

The Council fathers understood that the success of the renewal of the Church which they sought to bring about would be dependent upon the leadership ability of the priests to carry it out. *Optatam Totius* seeks to respond to the renewed understanding of the role of the ministerial priesthood that *Presbyterorum Ordinis* set forth. “The emphasis on the importance of taking account of both the local circumstances and the person to be formed in the seminary is a major movement from the past, as is the integrative approach to the program of priestly studies.”²⁹ *Optatam Totius* recognizes the importance of seminary formation for the priestly candidate, and just as the language of the Mass was to be in the vernacular (local language of the people), so too particular importance was given to formation and integrated training of the person of the priest as a whole, within the culture that he is to serve.

²⁹ Confoy, *Rediscovering Vatican II*, 104.

John Paul II continues this emphasis on the humanity of the priest in *Pastores Dabo Vobis*. He affirms that all candidates for the priesthood must have solid interpersonal skills and a capacity for affective maturity in order to benefit from the formation that a seminary provides. “Grace builds upon nature” is an ancient principle, but John Paul’s emphasis upon the human dimension in seminary training is recent. Prior to the Council, seminary training was primarily intellectual, spiritual and functional. The U.S. Bishops have embraced John Paul’s emphasis on the humanity of the priest, noting that the candidate needs to be able to make “a gift of himself and be able to receive the gift of others,” which requires “integrity and self-possession in order to make such a gift. The capacity to be fostered is the affective ability to engage in pastoral leadership with Jesus as the model shepherd.”³⁰ The human dimension of the priest is the foundation that his ministry will rest upon and keep coming back to as he enters into a myriad of personal relationships – all the while focused upon the universal mission of the Church to evangelize and bring the good news of Jesus Christ to people of every background and culture on the face of the earth.

The Bishops have also recognized the need for ongoing renewal of priests and have developed a plan for *ongoing* formation that complements their plan for initial formation. Central to their vision is an emphasis on cultivating and strengthening the

³⁰United States Catholic Bishops, *Program of Priestly Formation*, no. 83.

human dimension of the ministerial priesthood. "Integration is at the heart of ongoing formation, as priests grow in bringing together who they are and what they do. Their growth is really a growing integrity or connectedness of their ministry and their life."³¹ Precisely because the pastor will find himself in varied settings ministering to people of differing backgrounds, he will need to know himself and his capacity to enter into relationships with a strong "self" while at the same time representing something much larger than himself.

3.4.2 Bowen Systems Theory

The notion of integrity that the Bishops speak about correlates well with Bowen Systems Theory's understanding of self-differentiation. Friedman describes integrity as having a "sense of wholeness and coherent organization."³² He goes on to state that "the factors that promote [the preservation of an organism's] integrity in any human organism are exactly the same factors that, when they appear in a leader, promote the integrity of the organization he or she is leading."³³ In other words, the pastor is not leading a static institutional organization but rather a parish that is a living relationship organism. He best leads from a place of integrity and authenticity within himself by having a strong understanding or definition of self.

³¹ United States Catholic Bishops, *The Basic Plan*, 10.

³² Friedman, *A Failure of Nerve*, 157.

³³ Ibid.

One of the core elements that go to make up Bowen Theory's notion of self-differentiation is the ongoing work of maintaining a healthy balance between the basic human needs for autonomy and intimacy. Bowen Theory expresses the balancing act between being close in relationships (but not too close) and distant (but not too distant) by characterizing the extremes as relationship fusion and relationship cutoffs. Post-Vatican II documents stress the need for the ministerial priest to be a man who is close to the flock he shepherds. In pastoral leadership there is a particular relationship challenge to stay connected with the congregation and at the same time to maintain a professional and at times even emotional distance. This is especially critical when a particular family is in a time of crisis or trauma. The compassionate instincts of the shepherd are a powerful impetus to become so close that emotional fusion can easily happen, with the result that the professional distance needed to minister effectively gets lost. In reaction to the emotional intensity of ministering to families in crisis, another temptation is for a pastor to erect as a defense mechanism a highly aloof style to the point that he is "cut off" from meaningful relationships with parishioners. Bowen Theory would trace either of these patterns – leaders who think they lead best by becoming "one of the family" and leaders who form no close bonds with those they serve – to the dynamics of the leader's family of origin. Finding the appropriate balance between emotional cutoff and fusion is the key to the kind of integrity that Friedman describes above and that promotes a parallel integrity in the parish family.

Bowen Theory has explored and shed light on how emotional process dynamics work within relationship systems at every scale of complexity. But the theory identifies the triangle as the “basic unit” of every relationship system. Triangles are made up of three persons or two persons and a third entity that can become an anxious focus for the other two. The function of triangles is to spread anxiety around a larger geography, thus relieving the members of the triangle of being “stuck” with the anxiety all by themselves. A pastor enters into relationship with his congregation as a body and with the many individual members who make up the Body of Christ. By knowing himself and understanding how triangles work, he is more likely to set realistic boundaries and manage the various relationships in healthy and appropriate ways. For example, the more anxious and reactive the parishioner, the more intensely that person will move toward or away from the pastor by distancing from or fusing with the other point on the triangle.

When a parent becomes anxious and brings a troubled son to me, pleading that I “talk to him”, I immediately think in terms of triangles to understand the family dynamics and how I am being “triangled” and for what purpose. Bowen Theory reminds us that triangles are not “good” or “bad”; they are simply the way in which relationship systems manage anxiety. They become toxic or healthy depending upon how they are managed and how they help or hinder better self-differentiation.

3.4.3 Reflection on My Experience

My experience as a pastor is that I find myself a part of many triangles. Anxiety is usually what causes the triangles to form. Reflecting upon the dynamics at play or cause of the anxiety can be helpful. It is common for a current pastor to be in a “triangle” with the former pastor(s) even though he may be long gone. Parishioners love to make comparisons. When they praise the former pastor at my expense, I am the outside person of the triangle, and when they blame the former pastor they put him in the outside position. With the resignation of Pope Benedict in February 2013, and after the election of Pope Francis in March 2013, there were immediate comparisons in which those who preferred the leadership of Benedict would position themselves close with Benedict, putting Francis in the outside position. Francis “managed” this triangle masterfully upon their first meeting. When Francis and Benedict first met as pope and former pope, Francis did not take the front prie-dieu but rather knelt next to Benedict. They were side by side, together in the close positions, and those who sided with only one were on the outside of the triangle. Another example is that “liberals” in the church might claim Pope Francis for themselves, putting “conservatives” on the outside of the triangle. Francis maneuvered this triangle by staying close to his predecessors, announcing the canonization of Popes John XXIII and John Paul II³⁴ on the same day in

³⁴ John XXIII is generally seen as the “hero” of the progressive (liberal) movement within the church and John Paul II the “hero” of the traditional (conservative) movement within the church.

the same ceremony, thereby putting both liberals and conservatives in the outside position of the triangle.

I have found the more I understand the dynamics of how “triangles” work in parishes, the better I can understand which relationships can be affected and which are beyond my control. Learning to *see* triangles is the best stress management tool around, and it also helps make sense of the mystifying dynamics of relationships in parish life. When the relationship between two people becomes troubled, they will pull in a third person as a way of achieving stability. Two “pillars” of the parish who disagree will pull in the pastor – and a “peace at any price” pastor ends up feeling the stress if he takes on the tension. The more intense the situation, the harder it is to “de-triangulate” and get yourself out of it – and consequently the easier to absorb the stress and anxiety that it causes. Pastors of course cannot stay out of triangles, since they are a part of parish life – and a part of the human experience. Yet how we manage ourselves within the triangles is what is most important. I’ve found this advice of Ron Richardson helpful when I am able to:

1. learn to recognize these triangular patterns in relationships in the church and some of the underlying emotional difficulties that drive them;
2. learn how to be more comfortable in triangles, less reactive, more focused and able to define your own beliefs and direction; and
3. stay in emotional contact with the other involved people.³⁵

³⁵ Ron Richardson, *Creating a Healthier Church: Family Systems Theory, Leadership, and Congregational Life*, (Minneapolis: Fortress Press, 1996), 129.

Richardson notes that there are no simple techniques for dealing with triangles, but Jesus is a great role model. The story of the woman taken in adultery in John's Gospel is full of triangles. The primary one is Jesus, the Pharisees, and the woman. The Pharisees try to get Jesus to take a side so they can trap him. Jesus steps out of the triangle with his wise response, "Let him who is without sin cast the first stone." He directs their attention back to themselves and away from the triangular "other" focus.

A related concept in Bowen Theory is the idea that the extremes of any relationship are "cutoff" and "fusion." A common reality in pastoral ministry is for a pastor to be transferred from one parish to another. When the pastor leaves the parish where he has been serving for many years, rather than work through the emotional challenges inherent in saying good-bye and thus "leaving well," he can depart quickly, or leave in anger as a way to avoid the emotional intensity of the many relationships formed during his pastorate. Friedman says it this way: "People who are cut off from relationship systems, especially their family of origin, do not heal, no matter what their symptom."³⁶ The best way to bring about "healing" then is for the pastor to return to or reconnect with members of his (church) family to allow for the expressions of appreciation for his ministry and leadership. His return visit may afford an opportunity for forgiveness or healing to take place.

³⁶ Friedman, *A Failure of Nerve*, 202.

In working with our pastoral staff on “systems thinking” we spent time looking at how certain patterns tended to repeat themselves across multiple generations of parish leadership. By creating a “timeline” of significant events within the history of the parish, we gained several key insights. Particularly striking was a recurring pattern of difficulty handling transitions—both the departure and the arrival of leaders were often dealt with poorly. Departures were frequently hasty and relationships were not brought to healthy closure. Ordained and lay ecclesial ministers typically entered into their ministry in a haphazard manner, with no formal initiation or orientation process to help them become aware of the unique culture, history and mission of the parish.

Our systems thinking allowed us to recognize patterns that seemed to be passed down from generation to generation and spurred us on to become more proactive about the issue of transitions. In addition to creating a better orientation process for the future and paying more attention to departures, we also looked to rectify the past. On the occasion of the parish’s 25th anniversary, we invited all former pastors and staff members back for a “Founders’ Day” Celebration. Our purpose was to allow the system to express appreciation and provide an outlet for the resolution of any unresolved “residue” within the system. Those who came welcomed the opportunity to share in the storytelling and to be affirmed for their part in the building up of the community. It seemed to us that some long-delayed closure happened and a subtle but real measure of healing took place. Not all came, but even those who were not present expressed

gratitude for the invitation and appreciated that their unique contribution was recognized.

Systems Theory says that secrets in any “family” are a toxic force that corrupts and destroys healthy functioning. In 2009, Peggy Noonan stated in the *Wall Street Journal* that the Catholic Church ought to regard the media as its “best friend” precisely because it broke the silence and shed light on the abuse and the culture of secrecy that was destroying our Church. Bowen Theory has helped me understand that secrecy is an anxious reaction that only produces more anxiety. Somewhere or other we lost track of Jesus’ reminder that “the truth will set you free” (John 8:32). I now appreciate at a much deeper level why our people long for transparency in our Church and an end to secret keeping. Trust and our moral authority as teachers will only be restored when transparency and truth telling are restored at every level of our Church.

For this reason the parish instituted “Accountability Sunday,” in which the chair of the Finance Council and I speak at all the Masses at the end of the fiscal year to explain our annual financial report. Once, a visitor who was present for this report asked what scandal we were recovering from that required such disclosure. She was amazed to hear we do this every year, not as a result of any problem but because our understanding of faithful stewardship requires such an accounting. In the same vein, I’ve come to embrace the Safe Environment Program for children mandated by the U.S.

Bishops' Dallas Charter as a welcome way to reinforce "no secrets" and rebuild a culture of trust between parents and those who minister to their children.

I also recognize that trust and transparency must begin with the pastor. Shortly after instituting position descriptions and performance reviews for all employees, I also participated in an extensive 360 evaluation of my leadership as pastor. The results were then shared with the staff in the presence of the professional consultant who had conducted the review, as well as my plan to work on growth areas that had been identified. Truth telling and transparency, I am convinced, lead to greater trust and greater collaboration with the People of God in making known the reign of God in our midst.

3.5 Pastoral Dimension of Ministerial Priesthood

3.5.1 Vatican II

To better understand the pastoral dimension of the ministerial priesthood it is important to understand the Council's understanding of the mission of the priest:

Through the sacred ordination and mission which they receive from the bishops, priests are promoted to the service of Christ the Teacher, Priest and king; they are given a share in his ministry, through which the Church here on earth is being ceaselessly built up into the People of God, Christ's Body and the temple of the Spirit.³⁷

³⁷ Second Vatican Council, *Presbyterorum Ordinis*, no. 1.

The priest is called to serve the people as Christ would serve. He can no longer be set apart from the people as he was before the Council in an almost exclusively cultic notion whereby he was the representative of Christ standing behind the altar rail. The Council exhorts the priest to serve the People of God by being a minister of the Word, “to form a community, with a deep sense of its own identity, not static and hidebound by a constricting parochialism, but open in love and action to the wider community of the whole Church and the world – this is the challenge the Council throws down to her priests.”³⁸ To achieve this mission the priest must know his own identity and enter into relationship with his parishioners as a “shepherd of souls.” The Council gives direction to the pastoral formation of priests. It “should have as its object to make them true shepherds of souls after the example of our Lord Jesus Christ, teacher, priest, and shepherd.”³⁹ This mission is best seen within the pastoral dimension of the priest as he integrates the human, intellectual, spiritual and pastoral dimensions within his life and ministry.

The Council unleashed an expansion of ministries within the Church through its teaching that all the baptized share in the threefold office of Christ. Though the Council rooted the call and invitation to ministry in baptism, the Church has always been subject to an ordering through which it receives life from God. *Lumen Gentium* states “Christ

³⁸Guilford C. Young, *Priests*, in *The Documents of Vatican II*, ed. Walter M. Abbott, S.J. (New York: American Press, 1966), 529.

³⁹ United States Catholic Bishops, *Program of Priestly Formation*, 238.

the Lord set up in his Church a variety of offices which aim at the good of the whole body.”⁴⁰ The need for pastoral leadership of the people of God requires the pastor to move into a new, more challenging position, from being *the* minister to becoming a ministerial leader and animator of the baptized. Ministry thus takes on a far more relational approach and as a result the ongoing pastoral formation needs of the priest are more complex.

With a renewed understanding of the priest as a builder of the Body of Christ comes a need for a new kind of initial and ongoing formation to prepare pastors to respond to the needs of their day within their culture. The Council documents stand in relationship to each other, reflecting a balanced system of relationships while the post-conciliar documents on the formation of the priest continue to build upon the foundation of the Council. Today most priests have been formed either during or more likely since the Council. And while the documents of the Church call for a unified understanding of the ministerial priest, there exists an enriching diversity and plurality within the priesthood. Msgr. Jeremiah McCarthy, a former seminary rector, describes the Church as a “big tent” which not only allows but also welcomes engagement with “diverse, complementary theological perspectives from Augustine to Aquinas, from von

⁴⁰ Second Vatican Council, *Lumen Gentium*, no. 18.

Balthasar and de Lubac to Congar and Rahner.”⁴¹ Using this image of the Church as a big tent, there are many generations of theologians each in dialogue and discussion with each other contributing to the constant teaching of the Church. The post-Vatican II pastor who is being formed to be a shepherd to his flock must be able to “apply the constant teaching of the Church in the face of contemporary challenges.”⁴²

More than two decades following the Council, the Vatican recognized the value of ongoing formation as a “vital and necessary aspect of the life of a priest.”⁴³ The U.S. Bishops recognize that ongoing formation must include “institutional leadership and management.”⁴⁴ My experience after more than two decades of experience as a priest is that ongoing formation is as important if not more so than initial formation. Initial formation provided the basic theological education but is like learning to sail while sitting on the beach. One can learn by applying principles learned by watching, however being out in the middle of the bay is where a sailor really learns to sail, sometimes even by capsizing his sunfish.

⁴¹ Jeremiah McCarthy, “Reflections from a Former Seminary Rector,” in *Same Call, Different Men: The Evolution of the Priesthood Since Vatican II*, ed. Mary Gautier, Paul Perl and Stephen Fichter (Collegeville, MN: Liturgical Press, 2012), 211.

⁴² Ibid, 212.

⁴³ Dario Cardinal Castrillon Hoyos, “Letter to the National Conference of Catholic Bishops”, Vatican City, 7 February 2001 in United States Catholic Bishops, *Basic Plan for the Ongoing Formation of Priest* (Washington, DC: US Conference of Catholic Bishops 2001).

⁴⁴ United States Catholic Bishops, *The Basic Plan*, 29.

3.5.2 Bowen Systems Theory

One of the most surprising aspects of studying Bowen Systems Theory for me has been Friedman's development of the concept of the "fallacy of empathy."⁴⁵ He states "however lofty the original concept of 'empathy,' societal regression has distorted it to the point at which it has become a power tool in the hands of the weak to sabotage the strong."⁴⁶ Friedman believes that the focus on empathy rather than responsibility distracts the leader from leading. He describes "the introduction of the subject of 'empathy' into family, institutional, and community meetings to be reflective of, as well as an effort to induce, a failure of nerve among its leadership."⁴⁷ The antidote for this "failure" is self-regulation. For the pastor this means defining himself, rather than being defined by the other. It does not mean being uncaring – it actually means caring enough to sit with another in their pain and not take it away. In Friedman's words the fallacy of empathy means: "promoting responsibility for self in another through challenge."⁴⁸ By being overly empathic toward another, it encourages the other to reduce their courage in the face of challenge. He calls empathy the great myth that "feeling deeply for others increases their ability to mature and survive,"⁴⁹ when in fact it does the opposite because

⁴⁵ For a fuller understanding of Friedman's concept of the fallacy of empathy see Chapter 4 "Survival in a Hostile Environment: The Fallacy of Empathy," in *A Failure of Nerve*.

⁴⁶ Friedman, *A Failure of Nerve*, 24.

⁴⁷ Ibid., 133.

⁴⁸ Ibid., 135.

⁴⁹ Ibid., 133-134.

empathy does not encourage the other to define self and take responsibility for self.

“Empathy may be a luxury afforded only to those who do not have to make tough decisions. For ‘tough decisions’ are decisions the consequence of which will be painful to others (although not *harmful* to others – an important distinction.)”⁵⁰ Pastors are called on a regular basis to make tough decisions, especially in bringing about change within an organization. Not to make the decisions that take “nerve” is to commit the parish to maintenance and mediocrity at best. The pastor may be considered a “nice” guy, but he will be an ineffective leader and miss the opportunity to fulfill his mission to build the Body of Christ.

The fallacy of empathy is exacerbated during times of societal regression when safety wins out over adventure. While Friedman acknowledges that safety is a modifier of other initiatives, he does not believe that it is the most important value in life. In looking at what has been accomplished by previous generations, Friedman emphasizes, the willingness of leaders to take risks and be people of adventure. “Everything we enjoy as part of our advanced civilization, including the discovery, exploration, and development of our country, came about because previous generations made *adventure* more important than *safety*.”⁵¹ By its nature “breaking new ground” will require a sense of adventure by the pastor as he seeks to build the Body of Christ and serve the people

⁵⁰ Ibid., 137.

⁵¹ Ibid., 83.

of God. If he is to do this, the pastor will need to know who he is and be clear about his vision and the purpose of his ministry. The most important aspect of ongoing pastoral formation will not be the skills and competencies needed for leadership, essential as these are; it will be for the pastor to continue to define himself and his goals.

3.5.3 Reflection on My Experience

The U.S. Bishops describe the pastoral function of the priest to be “responsible for the Church as a community ordered in love.”⁵² They acknowledge myriad ways in which the pastor must function, including as employer and steward of the temporal goods of the Church. While Bowen Theory is helpful as a way of thinking systems, it does not negate the need to develop preaching abilities, management skills, and pastoral counseling expertise. Some basic functions such as creating complete job descriptions and conducting annual performance reviews are necessary for effective leadership. How these are done can be informed by Bowen Theory. When sitting down for a performance review, it can be very difficult for a pastor to hold a staff member accountable for goals and objectives being completed with excellence and on time. It is not easy to speak the truth about an employee’s substandard level of functioning. In one place I visited, the secretary was incompetent and at times rude by the pastor’s own admission. He was unable to terminate her or even hold her to a higher standard

⁵² United States Catholic Bishops, *The Basic Plan*, 29.

because “she needed the job.” Offering charity is an admirable stance, but the reality was the pastor’s empathy for his secretary’s situation limited his ability to hold her accountable.

For me the most challenging aspect of serving as pastor has been dealing with personnel issues. Learning to think systems has taught me to focus on my own functioning, be clear about expectations, and hold staff accountable. By my insisting on accountability, there were pastoral staff who decided that pastoral ministry was not something they wanted to be a part of, and so they chose to seek church employment elsewhere and sought to move onto a position that aligned better with their vision of how best to use their gifts and abilities. A valuable lesson I learned in the hiring process was to be as clear and concise as possible about what is expected so that the interviewee can make a good decision on whether or not ministering at this particular parish would be the right fit. I found it also provided a freedom to allow individuals to share more openly about what they were looking for.

As noted above, there are times when I experience sabotage or find that there is a difficult situation to attend to. The recession impacted our parish in 2010, offertory was down, and we had recently added to the campus several buildings for which utilities were higher than expected. This required significant budget cuts. Upon learning of the need to reduce expenses, it was immediately clear that swift action was required. As I brought the pastoral staff together to discuss our situation, I was keenly aware that it

would not be my limited financial acumen that would lead us through, but a calm presence in which I did my best to manage my own anxiety. I spoke of the mission of the parish and tried to define what is “mission critical,” and what would not be cut. With as much clarity as possible we articulated a plan for how we would go forward with budget cuts, a plan that also included what would not be cut – which helped to reduce the anxiety of the staff as they knew their jobs and current salaries would not be affected. Staying connected through informal meetings and more formal “line by line” budget meetings helped to assure the staff the ship would sail ahead, even if not at full steam.

The mission of the priest is to form minds and hearts of the people of God by preaching the gospel and connecting faith and life together. I found during my time as pastor that I would regularly receive feedback from a group of people that the parish spoke too much about social and political issues such as the Iraq war, immigration, death penalty and the acceptance of persons with same-sex attraction. They also felt that the parish at the same time did not speak out enough against abortion. These were each “hot button” issues, not only in the church but also on the front pages of the newspapers. To keep connected to people who disagreed or who saw some issues as “blue” and others as “red” was a delicate dance. One solution was the creation of study circles to attempt to bring folks of differing thoughts together. This met with only mild success as people tended to want to cut off those who thought differently.

One example that illustrates how I work at bridging the divides among parish members and attempt to stay connected to those who are my critics is the way I strive constantly to form the hearts and minds of my parishioners according to the Church's teaching on the dignity of all human life—from conception to natural death. The example of Francis of Assisi comes to mind in his admonition to “preach the gospel always, if necessary use words.” Thus, in my “preaching” I try to help parishioners understand the profound connection between two issues that often represent divergent political perspectives: defense of the life of the unborn and of those on North Carolina's death row. I make it a priority to be present with parishioners at the local Mass for Life in the diocese and the March for Life in Washington, DC in January each year, *and* I urge parishioners to join me at the vigil that takes place in front of Raleigh's Central Prison whenever there is an execution by the people of the State of North Carolina. “Systems thinking” teaches me that effective pastoring means staying connected with parishioners regardless of where their viewpoints put them on the political spectrum. I welcome the challenge of helping parishioners understand that the Church's social teaching regarding the sanctity of human life is not an “either-or,” but rather a “both-and.”

3.6 Conclusion

I began this section by describing my efforts as a boy learning how to sail and quickly becoming aware of the importance of the complex forces of Mother Nature. Ed Friedman concludes, “Mother Nature wins most contests of will . . . experienced sailors

have learned that far better than fighting those natural forces is to position oneself so that they will, in their own natural way, aid rather than frustrate one's intent."⁵³ As a pastor I've learned that to "position" myself for effective leadership involves becoming knowledgeable about the eight concepts of Bowen Theory and their application to pastoral ministry. Doing so has helped me view especially the storms of pastoral life through the lens of self-differentiation. I have come to understand in navigating my own little boat that the more I can think systems, when the winds of high anxiety come rushing through, the more likely I am to steer a course grounded in a calm, thoughtful approach rooted in my own beliefs and principles. Bowen Theory informs my pastoral practice, challenges me to take seriously God's call to holiness, and enriches me personally and professionally in a way that I believe helps me to be a more effective pastor for the sake of the mission of the Church.

From the Council of Trent to the Second Vatican Council, there developed a long-term homeostatic balance within the Church. John XXIII interrupted that balance and consequently raised anxiety in the system as he sought to renew the Church in its mission. John and his successors were men of the tradition. Through their leadership they have tried to create, even restore a balance while struggling with changed-induced polarization. The leaders of the Roman Catholic Church have been trying to manage

⁵³ Friedman, *A Failure of Nerve*, 229.

anxiety within the system of the Church while at the same time lead it forward to be faithful to the Church's mission to evangelize. Each of the popes has brought his more-or-less anxious, more-or-less calming presence to the Church. Most recently, Pope Francis is breaking new ground while at the same time remaining connected with the legacy of his predecessors. From the first moments of his pontificate when he stepped onto the loggia above St. Peter's square, he defined himself through his calming presence to the world. His humble stance, the simple words he offered, his clear vision of the Church as a "field hospital" healing wounds are examples of what a self-differentiated leader today looks like. The presence he brings to his position as the Chief Shepherd of the Church exemplifies what it means to be a "ruler of the community" and to "break new ground in pastoral methods."

Whether pope or pastor, we priests are set apart from the people only in the sense that we are called to minister to them, to shepherd them into communion with one another and with Christ. It is the mission of the ministerial priest to build up the Body of Christ, to have as Francis describes "the smell of the sheep." Bowen Systems Theory is an important and valuable lens for the ministerial priest of today to have on board as he navigates amid the churning waters of change in the Church to lead the people of God and build up the Body of Christ.

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